

The logo for ACADEMY is displayed in white text on a yellow rounded rectangular background. The word "ACADEMY" is written in a bold, sans-serif font. The letter "A" is the largest and most prominent. A stylized white leaf or drop shape is positioned between the "A" and the "E".

ACADEMY

Facilitator
Training Program



Welcome To CRADLE Academy! Thank you for investing in this facilitator training program.

Through this step-by-step training you will be informed and equipped to successfully facilitate online and be confident about your ability to do so.

Since 2020 facilitating online meetings, calls, training sessions and even family gatherings has become a necessity and not an option or occasional skill you may need.

If you go through this training and more importantly if you apply what you learn, you will become a highly skilled facilitator. You will be ready to facilitate and will do it competently.

This training is specifically tailored to:

Businesses

How to facilitate a teams meetings online

Face to face meetings with staff or colleagues

Interviews

Present

Charities/Community Organisations

How to facilitate a Trustee meeting

Online peer support meetings

In person support groups

Telephone peer support

121 call

What We Will Cover:

- **Facilitator Requirements & Awareness**
- **Roles & Team**
- **Body Language**
- **Preparation Practicalities**
- **The Tech & Timing**
- **Formatting & Structure**
- **Anger, Conflict & Group Dynamics**
- **Silence**
- **Post Facilitation**
- **Final Words**
- **Prep Sheet**
- **Opening Question**
- **Self Care Ideas**

Save or print this PDF somewhere convenient and refer to it whenever you need.

This training has been designed to be easy to digest with bite size videos accompanied by this PDF that get direct to the point and give you the value you need without having to sit through hours of content.

You can go through this training program in one sitting or go spread it out in your own time. The main factor that will develop the skill of facilitation for you will be **practice**.

So let's dive in so you can get to practice and application.

Facilitator Requirements

- **Awareness.**

You have to practice a certain level of self awareness to facilitate effectively. This is not just a requirement for facilitation but leadership in general. And facilitating is leading. It's leading a person or group through a meeting, session or call.

- **Hold the space - energy, attitude, presence, and authenticity.**

You don't have to be perfect, you just have to be present. Your presence is so powerful, especially in this modern age of distraction. People can really feel it when you're present and they can also feel your energy before you even speak. This means embodying a positive mental attitude, being self aware of body language, and comfortable in your own skin. It's enough to be authentically yourself. You can do this and maintain professionalism. Eliminate all distractions and really be present 100%.

- **Lead the structure/format of the group.**

As a facilitator you are responsible for leading the online session or meeting. That means leading the structure and format.

- **Keep timing and topic on track.**

Being conscious of time is essential as attendees of the meeting/session may lose track of time or go off track from the topic. Be aware, compassionate as well as bold.

- **Manage group dynamics.**

Be aware of attendees, comfortable with handling group dynamics and keep composure through it. You set the tone, so if you're comfortable, they will feel that and if you're angry, nervous or distracted, they will feel that too. Managing dynamics becomes easier with practice over time.

- **Active listening - using 2 ears and 1 mouth in proportion.**

If you are present and self aware during the session, you will be able to actively listen which means being able to respond, connect and manage effectively.

Roles, Co-Facilitators & Team

Whether you are facilitating alone or with a co-facilitator, communication is key. if you have.

- **Facilitator leads the way.**

The facilitator leads the structure, format, opens, manages and closes out the session.

- **Co-facilitators are there to support the facilitator and be present**

The co-facilitators are just as important as facilitators. Being present and aware during a session is crucial because the co-facilitator may notice something the facilitator doesn't. People can tell if someone is not engaged or is distracted so holding the space is just as essential from a co-facilitator or supporting team mates as the facilitator.

- **Both are present and in sync with each other: if facilitator forgets something, the co-facilitator chimes in.**

When both facilitator and co-facilitator work in harmony with one another it can be felt by the attendees. Just as tension can be felt between people. It's about energy. Keep it simple, and keep it respectful.

- **Relationship of love, respect and no ego.**

Team work really does make the dream work. Leave ego at the door and work together.

- **Communication**

Clear communication between team members is key. The clearer the roles the more there will be flow and any hiccups or issues can be handled efficiently.

- **Roles**

Be very clear about the roles of co-facilitators or supporting team members and make sure everyone is comfortable with their roles. Whether someone is assigned to moderate the chat box function to share relevant links, types out questions/agenda points or to present some information or share data, ensure they are clear on what they need to do and when.

Non-Verbal Communication

An effective facilitator practices self awareness and is also aware of others by practicing active listening and observing body language. If non-verbal communication accounts for 70-90% of Communication, what are you communicating non-verbally?

The following are 5 things to be aware of when it comes to non-verbal communication:

- **Facial Expressions** - smiling, frowning, and other facial expressions communicate different things, so be aware of your own facial expressions. You don't have to be expressionless like a robot, when you are actively listening you can respond with appropriate facial expressions to communicate your intended message.
- **Body language** - be aware of what you are doing with your body. You can communicate completely opposite messages just with your posture - if you are slouched as opposed to sitting straight. Also nodding, hand gestures, arm positioning/folding, playing with hair, fidgeting, etc. Be aware of what you do with your body.
- **Voice** - tone, pitch, volume and speed. We've all heard "it's not *what* you said it's *how* you said it". Use your voice with awareness so you communicate what you intend to communicate.
- **Clothes** - dressing appropriately for facilitation. This means smart, relaxed and casual in many cases. Plain is best, without messages, words and signs unless you are wearing your own branding or company uniform/brand. Of course if you're facilitating a black tie event then dress for the occasion. Whatever you wear make sure you're comfortable so you're not distracted.
- **Eye contact** - on zoom or online platform it's the camera. This can be challenging when facilitating virtually but remember the camera is where your eye contact is. Of course you will want to look at the attendees when they are talking so find your own balance between looking at the screen at the attendees, and making "eye contact" via camera. A good balance here will be to make eye contact when opening, breaking and closing. Then while attendees are talking, look at them. People are experienced enough now with virtual zoom calls to know what you're doing.

Preparation Practicalities

Success and winning in most things is in the preparation. The following are practical things you can do to be physically, mentally and technically prepared to facilitate a successful call, meeting, online or offline session.

- **Communicate with co-facilitators.**

Touch base and connect with your co-facilitators and team members if applicable.

- **Make sure computer/laptop devices are charged, phone is on silent, drink of water, tissues at hand, etc.**

Set yourself up ahead of time so you're not rushed or flustered. Same thing applies to live meetings. Be prepared and show up early.

- **Create the space within you before you show up to facilitate**

Set a buffer of time before you are facilitating where possible. Sometimes this may be unavoidable. A buffer of time allows you to clear your mental space and energy so you don't take energy from one call, session, or meeting to another. Use this time to do whatever you need to do in order to feel grounded, present, and get in the right headspace.

- **Leave all distractions, life, chores at the door and be 100% present.**

Ensure you are distraction free and have privacy to facilitate. If you're in a shared space, make sure you do everything you can to eliminate distractions.

- **Your energy sets the tone, people feel it – get yourself calm, relaxed and comfortable.**

If you're relaxed and calm, everyone in the group will feel it. If you're nervous, they will feel that too. Make it about serving them and get yourself comfortable. This is why the most successful people in the world have morning routines where they get themselves into a peak state physically, emotionally and mentally. Do whatever you can, fit whatever you can into your daily structure to ensure you are constantly filling your cup and not pouring from an empty cup

Example of preparation exercises: Take a walk, meditate, do some stretches, avoid social media, calming music, read, journal, etc.

The Tech & Timing

Ahh the tech and timing!

- **Get Familiar with Tech**

If you're facilitating online it's really important to get familiar with the tech you will be using. That means hardware as well as software.

- **Connection Speed**

If you are facilitating from a different location connection speeds of the internet may be different than what you're used to. Give yourself enough time to set yourself up and test your connection.

- **Show Up Early**

We've all been there when something usually takes you 2 mins to login but then something needs an update, or you need to restart your device or something unexpected happens... so show up early. For live facilitation show up an hour early to set up (eg. props, papers and PowerPoints, and still have time to relax).

- **Make Friends with Tech**

Technology is great when it works and sucks when it doesn't. However many people have resistance to tech and this really hinders them. Make friends with technology because it is here to stay and we can really harness it's power to become effective facilitators. Where possible find the right software and hardware that works best for you. If you are assigned a specific software or hardware, make peace with it and learn how to effectively use it to the best of your ability.

- **Backing Up**

Back up device where possible. This maybe a cloud, another laptop, phone, tablet, etc. Sometimes even finding back up co-facilitators and supporting team members on stand by can be the most effective and appropriate action step to ensure a successful meeting, training or session.

The Tech & Timing

- **Timing**

Both humans and technology can be a little unpredictable at times. You can't control others but you can control yourself. If you're well prepared - you can control the timing of your meeting and facilitate effectively even if things don't go as planned during the actual meeting, call or session.

Be time aware while facilitating...use whatever works for you and is appropriate for the session, call or meeting. This may be a clock on the screen that everyone can see, a watch, timer, alarm, or team member prompting you.

For live facilitation make sure you have access to a clock, wear a watch or have a team member prompt you with timing without interrupting your flow where possible. This can be done with pre-agreed hand gestures or holding up pieces of paper with timing prompts. For example at live events it's common to have a team member in the room hold up pieces of paper that say "10 minutes", then hold up another one that says "5 minutes" and then a final prompt that says "1 minute". This communicates to the facilitator they need to wrap up and allows them to manage their content within the time period left.

Send reminders and confirmations to people about the date, time and location. We live in the age of distraction so create as much clarity as possible about where and when you will be facilitating the session, meeting, call or interview so you can eliminate miscommunication as much as possible.

How can you prepare yourself to get into the right headspace for facilitation?

What practical things will you do to ensure you're ready and confident?

What do you need to practice in terms of the tech and the content you will deliver?

How will you be time aware?

If applicable who will be your supporting or co-facilitators and what role will they play?

How much time do you need to spend with your team and when will you connect with them to ensure your meeting or session goes smoothly as possible?

Group Formatting & Structure

Before we dive into group formatting and structure, let's dive into the value of it. Why do we need one?

Think of your favourite restaurant.

You know the structure don't you?

- You have clarity over the process of dining.
- You have comfort of familiarity - maybe the staff, the menu, the vibe.
- You probably have your favourite items from the menu, you know the prices and the style of dining.
- You know the consistency of food, quality and service. It's probably why it's your favourite.

Well that's all structure.

And that's the value in what we are about to cover. A structure enables you to have confidence, clarity and allows regular attendees to have a level of comfort and familiarity.

The structure of facilitating - whether it's an interview, team meeting, training session or trustee meeting - is like a story, there is:

- **Beginning**
- **Middle**
- **End**

Let's dive into them.

Group Formatting & Structure

BEGINNING

- Jump on the Zoom/arrive at the meeting place before the beginning. Connect with the team (if applies to you) If it does apply get your team on the call or at the place of meeting 10 to 15 mins prior to the actual session or meeting.
- Open the group with Welcome, introduce yourself and co-facilitator.
- Go through the agenda, purpose of the meeting - breakdown the order of the day (break time, end time, etc).

MIDDLE

- Dive into your prepared agenda, training, discussion questions. Depending on the style of meeting it may be appropriate to get attendees/participants to introduce themselves, or have some open questions prepared to get them engaged. Studies show that people who are engaged during trainings and meetings will retain more information than those who are not engaged and simply show up to a meeting, class or training.
- Break – If there is going to be a break, let them know at the beginning when it will be. Start back on time regardless if someone hasn't returned or cameras are off. Lead the way.
- Go the rounds with your agenda.

END

- Be time aware and give attendees/participants a heads up before the end so they are not sprung with the end.
- 10/15 mins before end (depending on size of group and if its appropriate – ask participants what they will takeaway from the session or what they found most beneficial or their next plan of action. You can ask them to rate out of 10 how useful the session was. If it's an interview for example this would be a good time to see if they have any questions or concerns for you.
- Wrap up, end on time. If applicable tell them the next step - next meeting, action on the agenda discussed, whatever is appropriate for you and the purpose of the meeting or session. This applies for a phone call, as it does a team training, interview or a meeting with trustees or board of directors.

Anger, Conflict & Group Dynamics

The following break down covers the most common dynamics and how to deal with them:

- **It's not personal.**

Don't take anything personally, people are going through challenges and you never know what's going on with them. Hold the space. Be open to constructive criticism.

- **Observe don't absorb.**

Learn to observe people in their emotions without absorbing the emotion into you.

- **Don't interrupt someone if they are talking, make a note if you want to address or acknowledge something.**

A handy tip is to have a notepad and pen so you can make notes.

- **If someone is going over time with sharing or has gone off topic, wait for a natural pause in speech to interject commenting/thanking/acknowledging what's been said and redirecting the conversation back to center or inviting other members to participate in the topic.**

Never panic, just practice active listening and be compassionate as well as bold.

- **Mute, switch off cameras and mics of attendees when appropriate to do so.**

If you or co-facilitator see something inappropriate mute or turn off the attendees camera and state it to them as well as the group, what you've done, why you have done it and they can return to the group when they're ready. Again, be compassionate yet bold.

- **Remind group participants of any guidelines or company policy whenever needed and appropriate.**

Perhaps even drop a copy into the chat box for their reference if required.

TIP: It's natural for people to feel angry, give advice, be a quiet participant or an over-share. Practice active listening, thanking and acknowledging the participant as well as the elephant in the room. If re-occurring incidents by a specific person happen, decide on the best form of action whether it's a conversation, warning or you get a supervisor onboard to be aware of the situation. Choose what is most appropriate for you.

Silence

It's such a natural part of life, yet many people fear facilitating because what if there is silence! Silence is very natural, can you imagine life if there was never ever any silence? We would lose our minds and rightly so. Even nature itself uses silence to create balance.

The following are 4 tips that can help you handle silence if and when it occurs:

- **Silence is natural.**

When you have a healthy relationship with silence it will be as natural to you as breathing and speaking. It's not a bad thing. Don't judge it. It just is.

- **Don't feel the need to fill silences.**

You don't need to speak to fill in the silences. Let it be. Sit with it. If you ask a question and nobody answers - give it a minute. Let it breathe. Sometimes people are shy, sometimes everyone is trying to be polite and waiting for someone else to speak. And sometimes you can answer the question yourself or ask the co-facilitator to chime in.

- **Relax and be comfortable with silence.**

You set the tone as facilitator. If you're relaxed and comfortable with silence, the group will be too.

- **Lead with presence and awareness.**

During silences people may look to each other but mainly at you to lead. Lead with your body language, be aware of timing, for example a minute of silence is fine, 15 minutes of it not so much. Be aware of team members, attendees and also be prepared with a variety of open questions you can introduce.

TIP: If you're not used to silence in your personal life, schedule an hour of silence into each day and just experience it until it becomes something you appreciate and enjoy as an integral part of nature.

Post Facilitation

- **Reflect on experience/meeting/session:**

What went well, what could be better?

It's always better to have a balanced perspective.

- **Triggers:**

Was anything triggered in you, how can you use this as an opportunity to learn, heal and grow? How will you address what has been triggered - through journaling? Talking it through with your supervisor? Going for a walk to process how you feel and why?

- **Future sessions:**

Were there any themes/topics you want to bring into future meetings or sessions? Anything you will do different? Anything needs to be addressed in future. sessions?

Reporting Issues:

- Document facts

Just like a police statement, you want to be as fact based as possible if an incident happens.

- Don't take it personally

It's not personal, observe don't absorb the emotions.

TIP: It helps to have a buffer of time scheduled before facilitating and after facilitating. Use these buffers to go for a walk outside, meditate, journal, stretch, etc. Self care is essential to effectively serve others and hold space. And facilitation is holding space whether it's a call or interview with one person, a group/team meeting or a training session.

Final Words

Learning the structure, format and preparing some questions is the easier part. Believe it or not even the tech is the easy part.

The most powerful thing you can do to ensure a successfully facilitate is to be present, bring the energy and hold the space.

This comes with **preparation, practice, self awareness,** and **self care.**

Holding space for other people is like holding a pool of clean spring water. Certain emotions clean the water while others are like toxins. What you feel you put into the water. And what you feel they feel.

So if you don't want to bring nervousness, self doubt, worry or panic to them, don't bring it in you. Observe it and release it. You are as confident as you allow yourself to be.

For you the facilitation will begin before it actually begins, this is by using the time buffer we discussed, so you can get yourself in the right head space. When you're in the right state, you will be able to observe and not absorb the emotion of others.

Strive for progress and not perfection with the skill of facilitation. You really do get better with practice and awareness.

You got this.

With Love

CRADLE ACADEMY TEAM

Open Question & Engagement

Open questions are great for encouraging engagement. The more engaged they are the more present they are and therefore will retain whatever happens in the meeting, which makes the meeting or session worthwhile and not a waste of time.

Look at the difference between closed and open questions:

How are you today? (open but perhaps too open with no direction)

Are you ok? (closed with only yes or no as main response)

What's the highlight and the challenge for you today? (open and guided/facilitated)

Having open and closed questions prepared, or having your agenda clear in front of you can prompt the right questions and evoke engagement from participants...this works whether it's one person or 100 people on a call. Of course if there are 100 people or even 1000 you won't be able to get them all to speak and take air time but you can encourage them to use the text box which most online platforms have.

Closed Questions

Where open questions can effectively evoke engagement, closed questions can work very well when facilitating a large group of people online or live. You have most likely experienced or witnessed this yourself at an event where the speaker asks the audience to raise their hands if they relate or agree with something.

When using closed questions online a great example is to ask the attendees to type 1 for YES and 2 for NO.

You can also use A or B as closed question answers. This is effective because you will be able to see the quantity and ratio of the responses especially if you ask the audience a poll to vote on something. It's simple, effective and easier to read a sea of number 1's and just a few 2's then it is to read a sea of individual answers and responses that you don't have the time to read through.

Facilitation Prep Sheet

Whether you are facilitating using a presentation, excel sheets, on a phone call, interview, trustee meeting or training session, it can be incredibly useful to have a prep sheet.

It's quite common to use several software programs at the same time while facilitating online, whereas facilitating live may require a mix of printed content and digital presentations or devices.

Whether you print out the following prep sheet, use a physical or digital notebook to prep your points, structure, notes and reminders, do choose something to refer to during facilitation because we can all forget things or get thrown off at times.

Having a prep sheet helps get things on track and also frees up mental space because there is no need to remember all the points - they are laid there right on the prep sheet so we can focus on being present and putting 100% into facilitation.

The following is an example prep sheet. Feel free to print it or create a custom one to meet your specific needs.

Facilitation Prep Sheet

Intro:

Open questions for use during the meeting/training/session:

- _____
- _____
- _____

Feedback Questions:

- What was the biggest takeaway or most useful aspect for you today?
- How useful for you was today out of 10?

Notes:

Self Care Ideas & Headspace

As discussed in this training, a core component of successful facilitation is to get into the right headspace and preparing mentally as well as practically for whatever meeting, interview, or session you are leading.

Self care is a necessity and not a luxury when it comes to effective leadership and facilitating.

The following are some self care ideas you can use to get in the right headspace:

- Go for a walk (in nature if possible)
- Bath/shower
- Clean your space where you work and live
- Yoga, Pilates, Qigong, Tai Chi or Stretching
- Breath Work/Meditation
- Reading a book that gets you in the desired headspace
- Listening to music that makes you feel empowered and inspired
- Hang out with a pet if working from home
- Watch stand up comedy
- Colouring/Drawing/Sketching

Here are some final questions for you to explore:

What gets you in a grounded and present state of mind?

What makes you feel confident and competent?

What self care practices will you implement into your daily life?

What current self care practices can you elevate and advance?

How do you feel when you make time for self care as opposed to neglecting it?

How can you incorporate self care time into your structure before, during and after facilitation?

How will you be present enough to remember to remain observant and not absorb the emotions of others?

What can you do to be objective about your facilitation skills and monitor your progress regularly?