



Art of Facilitation

HANDBOOK

MY MONEY *Dream* 

“Facilitation is the art, not of putting ideas into people’s heads, but of drawing ideas out.”

A Great Facilitator: Skills & Characteristics

A great facilitator:

- Creates a safe environment for participants to become actively engaged.
- Utilises the art of "the question" to create and cultivate new possibilities and new thinking.
- Engages the group and has a willingness to see things differently.
- Guides the conversation and supports participant's personal journey of self-assessment, self-determination, reflection and new learning.
- Is passionate and dedicated to bringing about long term behaviour change.
- Taps into the wisdom of the participants, as the value derived in each discussion is a result of the wisdom of the group.
- Demonstrates impartiality at all times.
- Clearly defines the difference between information and advice.
- Is fluid and flexible.
- Connects with the group - has the ability to relate to people of different cultures and ethnicities, socio-economic groups, income levels and varying levels of financial capability.
- Is non-judgemental and adaptable to the needs of participants
- Plans effectively yet is fluid based on the atmosphere and needs of the participants.
- Is authentic and shares themselves with others.
- Has fun and is passionate about the transformational process that occurs.

Facilitation is the art of stimulating deeper understanding, fresh thinking and behavioural transformation.

Facilitator vs Teacher

		Facilitator	Teacher
1	The focus is:	On the participants	On the teacher
2	Role:	To assist the progress of competency development	To teach a subject
3	Power:	Shared with the participants	Held by the trainer
4	Students:	Joint participant	Empty vessels to be filled
5	The facilitator/lecturer is:	Another participant	The expert
6	Structure:	Flexible	Formal and fixed
7	Content:	Case studies	Information
8	Relationships:	Close, but respectful	Distant
9	Main Task:	Listening	Telling
10	Seating:	Circles	Rows
11	Stance:	Mainly seated	Mainly standing
12	Questions from the group:	Relayed to others in the group	Answered by the teacher
13	Ideas from Peers:	Valued	Not valued as much as the teachers ideas
14	Theory of learning:	Experimental	Knowledge transfer
15	Discipline:	Used quietly, encouraging self discipline	Necessary to keep order
16	Resources:	Used by the participants to develop competency	Sources of information to read and remember
17	Learning is evidenced by:	Participants putting into action	Memorisation of facts
18	Most useful resource:	Participants' own experiences	Textbooks, notes, teachers expertise
19	View of participants:	Mature colleagues	Immature students
20	Discussion:	Encouraged	Discouraged, unless they know the answers
21	Right or wrong:	A matter of context debate	Can be found by asking those who know

Facilitator Code of Conduct

Respect, Safety, Equity and Trust

We “facilitators” strive to foster an environment of respect and safety where all participants trust that they can speak freely and where individual boundaries are honoured. We use our skills, knowledge, tools, and wisdom to elicit and honour the perspectives of all. We promote impartial relationships among the participants and facilitator and ensure that all participants have an opportunity to examine and share their thoughts and feelings. We use a variety of methods to enable the group to access the natural gifts, talents and life experiences of each member. We work in ways that honour the wholeness and self-expression of others.

Impartiality

While participants bring knowledge and expertise concerning their personal situation, we bring knowledge and expertise concerning the group interaction process. We are vigilant to minimise our influence on group outcomes, impartiality is crucial.

Financial Advice

It is not our role to give financial advice, we are not qualified financial experts. We can share stories of our own financial decisions and ask the group to share too, however we refrain from giving specific and individual financial advice. Refer participants to websites and organisations that could assist them further.

Confidentiality

We observe confidentiality of all participant information. Therefore, we do not share information about a participant, nor do we report on the individual opinions or behaviour of members of the group without consent.

Professional Development

We are responsible for continuous improvement of our facilitation skills and knowledge. We continuously learn and grow. We seek opportunities to improve our knowledge and facilitation skills to better assist groups in their work. We remain current in the field of facilitation and financial capability through ongoing personal development.

Professional Integrity

We do not discriminate on the grounds of sex, gender, sexual orientation, age, colour, race, ethnic or national origins, citizenship, marital status, family status, mental or physical disability, religious or ethical belief, political opinion or employment status.

“
Tell me and I forget.
Teach me and I remember.
Involve me and I learn.”

— Benjamin Franklin

As a facilitator, I will:

- Respect the participants.
- Validate their experiences
- Treat them with dignity, compassion, respect and unconditional high regard.
- Give each person choices and options, not final answers.
- Support the concept that each person is the expert on themselves.
- Respect the rights, dignity and worth of others.
- Be fair, considerate and honest in all dealings with others.
- Be professional in, and accept responsibility for my actions.
- Make a commitment to providing quality service and performance.
- Refrain from any form of abuse, harassment, discrimination or victimisation towards others.
- Provide a safe environment for the participants.
- Show concern and caution towards others who may be sick or injured.
- Be a positive role model.

In this work, we agree to foster and nurture a safe environment for our participants which is:

- Based on self-determination – it opens the door for individuals, but doesn't dictate their path.
- Rooted in the belief in equality – no one is any better or has higher value than anyone else.
- A mutual learning model, where people work together to increase understanding and promote financial well-being.
- Adaptable to anyone's personal philosophy.
- Based on common sense.

You have to get along with people, but you also have to recognise that the strength of a team is different people with different perspectives and different personalities.

Preparing for the Programme

- Community Engagement – how will people know about this workshop.
- Cohort confirmation – registration (will there be children?), key contact.
- List of attendees and contact details if required.
- Venue check – know where you're going, key contact for access, directions for participants.
- Catering – who will be providing it, how will it be delivered, quality and budget etc.
- Equipment - projector, screen, speaker (for background music at start and break time) stationery packs, kids activity packs etc.
- Printing handouts, activities and resources (some may need laminating and cutting up!).
- IT – laptop, projector, places to plug in, screen or wall etc.
- Set up of room – tables, chairs, seating plan etc.
- Health and Safety protocols (access to building, given a key, toilets, kitchen, accessibility etc).
- Participant feedback – post its notes or pieces of paper.
- Participant survey/collection of data.
- Time keeping – importance of start and end times.
- A particular dress code - is this relevant for your audience?
- Do you need to open and close with a prayer or a traditional welcome etc – if so ask permission from people who you'd like to undertake this e.g. church or tribal leader).
- Break time during programme – keep an eye on the groups energy levels (body language).
- Help to pack up at the end.
- If facilitating online – do you have a stable and reliable internet connection?
- If facilitating online - are you comfortable/ confident with the online meeting platform you're using? (If not do some practice runs first).
- Follow up with any commitments you made to the participants e.g. a follow up email.

The job of a facilitator is not to keep things on time, but to enable the creation of safe time.

Useful Tips

Pre and Post Workshops

- Prepare, prepare, prepare!!!
- The guide is not a script
- Know the content before delivering workshops.
- Have some fun uplifting energiser activities on hand should you need to energise the room.
- Personalise your delivery
- Add your own relatable stories
- Do not change the content, consistency across the country
- Reflect on each session and note any learnings for future sessions. These could be facilitative, environmental, participant learnings, approaches, pitfalls, unforeseen questions or situations.
- It's always good to share your learnings with your fellow facilitators who may have some helpful tips or strategies on how to manage differently going forward, or could use your experience as a learning opportunity.
- Identify your own knowledge gaps and learn more

During Workshops

- Be confident, clear, and enthusiastic. Breathe!
- Learn the participants names as quickly as possible, it's a great way of building rapport. Ask them to write their name and put it in front of where they're sitting helps.
- Allow a 9 second response time after asking a question.
- Use humour, stories and examples that directly relate to your participants.
- Clearly explain all activities and be prepared for questions.
- Observe individual participation and involvement during sessions.
- Be flexible, let the group lead the learning
- Keep in mind any individuals who appear uncomfortable with the topic or related discussion, struggling with concepts, resources or who are not participating. They may need a buddy or some additional support.
- Be natural and make it fun!

- **And remember – the knowledge is in the room!**

To read a group the first step is to listen more and talk less. There aren't many laws when it comes to groups of human beings, but there is one that has never failed us: if you don't talk, someone else will

Open Ended Questions

There may be times when participants are either reluctant to participate or the discussion comes to a sudden 'halt'. Below are some tips/discussion starters to help you in such situations:

- How does that make you feel?
- Can you elaborate, tell me more?
- Has anyone else found this?
- Has this worked for anyone?
- Can anyone give an example?
- Does anyone have a differing experience?
- Does anyone have any tips or suggestions?
- Why do you think that is?
- Can you think of a situation where this wouldn't work?
- Is there another way to view this?
- I am not sure exactly what you are saying, is it...
- Have you thought about 'x'?
- Who else had the similar experience or was in a similar situation?
- You may also find you may need to reword a question if no one responds.
- If, after the 9 second rule, you've still had no response look for non-verbal signals from participants that they might want to respond (leaning forward, 'thinking' face, eye contact etc.) and ask the question to them directly.

Speak in such a way that others love to listen to you. Listen in such a way that others love to speak to you.

Effective use of Visual Aids

- Be sure your visual aids can be seen and understood by everyone.
- If you are using technology, allow time to set up prior to your workshop.
- Remember that your visual aids support your presentation; they are not the presentation itself.
- Ask yourself if any particular visual aid will increase learning. If it doesn't do this directly, don't use it.
- Be prepared in the absence of technology to deliver the programme without visual aids. Or think of alternative solutions that may work.
- Have a plan in place in case you have technology issues (especially if running online workshops).
- Make certain that the room's lighting supports your visual aid. Watch for things like glare, a washed out screen, dark spots, etc.
- Don't allow visual aids to take your attention away from the participants.

“Only someone who is well prepared has the opportunity to improvise.”

— Ingmar Bergman

Facilitator Reflection

Take a few minutes to reflect on your facilitation style, over the course of delivering the workshop many times you should see growth and depth to your own facilitation delivery.

WHAT DO I DO WELL?

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WHAT CAN I DO BETTER?

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HOW ELSE CAN I UPSKILL MY KNOWLEDGE? WHAT KNOWLEDGE GAPS DO I HAVE?

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