



# Creating a Facilitation Plan

by Vicky Minderhout, Seattle University

Facilitated classroom activities make up the public face of teaching. When preparing to facilitate these activities, teachers should use a facilitation plan for reasons made evident in this module. Such a plan arises from applying the facilitation methodology (see *Facilitation Methodology*) in a step-by-step fashion. This facilitation plan module includes a plan template (found on the third and fourth pages of this module) and exemplifies how to fill it out. It emphasizes the importance of assessing facilitation performance after each classroom activity.

## Need for a Plan

Careful planning lies at the heart of successful performance (Millis, 1998). The planning process recommended in this module will help the teacher attend to the facilitation principles (see *Overview of Facilitation*), work through the facilitation methodology, and anticipate learner needs (see *Identifying Learner Needs*). Since these needs revolve around process issues that impact learning, most facilitators will find it beneficial to reflect on these issues and plan how to address them. In addition, the preparation of a written organizational framework before facilitating an activity not only serves as a prompt during facilitation but also forms a permanent record of what was attempted by the teacher during the activity and becomes the basis for assessing performance.

## Elements of a Plan

A complete plan consists of three components. The first component encompasses planning prior to the facilitation (page one of the Facilitation Plan template). The second component involves recording data during the facilitation (page two of the template). And the third concludes the data collection and provides for reconciliation of the planning with the execution and assessment of the facilitation and the learning outcomes (also on page two of the template). Before reading the next section, it will be helpful to have the blank facilitation plan template available.

### Prior to the activity

1. To prepare to facilitate a classroom activity, begin by reviewing relevant previous activities: e.g., the activity you most recently facilitated, this particular one done in a previous offering of the course, an activity of the desired type, and/or ones that emphasize the skills you intend to stress. Establish your outcomes for the activity (three are sufficient), and incorporate skills from more than one domain (cognitive, social, affective, and psychomotor domains). (See *Classification of Learning Skills*.) Early in the term, you might consider building teamwork and communication skills. It is useful to consider and note anticipated evidence for each outcome on page one of the template, along with the outcomes.

To illustrate this process, look at the first example in the Facilitation Methodology module. The example is an activity to introduce members of a new community to each other with the following desired outcomes: (a) help each group member begin to recognize the special qualities of each other community member; (b) make the first team activity a confidence-building one; (c) emphasize the fact that learning is fun and everyone is accountable for their own learning.

Note that the skills needed to accomplish these outcomes are empathizing and building self-esteem (affective domain), attending and rephrasing (social domain), and: making connections/convergent thinking (cognitive domain). Evidence that the outcomes are being accomplished would be (a) respectful language as the teams interview each other, (b) full participation of all team members in the activity, and (c) smiles but signs that no one is goofing around.

2. Once your outcomes are established, select an activity type to facilitate the outcomes. The outcomes or activity type you selected may require certain roles for group members.
3. Therefore, in the plan you should define the roles to support the outcomes and activity type. In the example above, the facilitator has decided to use a pair-share interview style activity. Roles were not needed.
4. For many activities students must complete an assignment prior to class in order to prepare themselves to participate. Some pre-assessment of the preparation should be planned to make sure that all students have completed the pre-class assignment. If the pre-assessment is a quiz, include an estimate of its time in the plan. In the example, the facilitator needs to ask the students if all their basic needs have been taken care of—i.e., registration, food, materials, etc—so the participants can focus on the activity. This will probably take only a minute or two.
5. Instructions to the students for the activity are outlined in the activity set-up. Focus on the purpose, expectations, roles, and the amount of time allocated, including the closure time. Also identify for the students the

learning skills they should focus on during the activity, usually one skill for each domain. In the example, the facilitator tells the students the purpose of the activity is to get everyone introduced and comfortable in their groups, that they are accountable for their interview information, that the format of the activity will be pair-share for 20 minutes, and that each student should focus on attending and rephrasing.

6. Anticipate what to expect when observing the group work. List the skills on which learners should focus (which were listed in the outcomes) and anticipate situations during the activity in which you might observe them performing the skill. This will help you make better real-time observations and improve the interventions on process. Since attending and rephrasing were given as skills in the outcomes, you expect to see some interchange between the two in the pair share, rather than just nodding of heads.
7. Plan for closure of the activity. What will be shared between the teams? Will the facilitator participate in sharing? Will the data be recorded on an overhead or computer or will sheets be collected from the groups? Will groups report on and/or turn in reflector and recorder reports? For the example in the facilitation methodology, each student might be asked to introduce his or her interviewee and share a goal and something unique about the interviewee with the class. For activities that involve more cognitive outcomes, sharing discoveries about the material can enhance growth.

### **During the Activity**

8. At the beginning of the activity, note the effectiveness of the setup, particularly how much time was spent.
9. During the activity, monitor the teams for real-time data on the conversations in the groups. Collect data by taking notes on what is going on in the groups, focusing on the identified skills, but being open to other observations. Things to consider would be observation of outcomes being met, questions asked by team captains, and your responses. Record any interventions you make and the result.
10. During the closure period, document the team's oral reports. The better your notes are during the classroom session, the more real-time data you will have to improve your own performance as a facilitator.

### **After the activity**

11. You have collected notes during the activity and the teams may have supplied recorder reports, reflector reports, and closure notes. From this wealth of data comes the reconciliation of what was planned for the activity and what actually occurred. Review the outcomes. Were they met? If the activity went well, it is useful to identify the key issues that came together to make it a success. If the activity did not help the student meet the outcomes, then a review of the components of the activity is necessary. Were the outcomes too broad? Was the activity type appropriate to achieve the outcomes? If the students were not prepared, what could be done about that? Did closure result in significant learning growth?

### **Assessing facilitator performance using the plan**

12. A facilitation plan is also useful for improving the facilitator's performance. If the activity outcomes are not met, it is necessary to decide if something is wrong with the activity and how to fix that, but, more importantly, what to do at the next class session to improve the facilitation. For best results, this assessment should give strengths, areas for improvement and insights about the facilitator's performance (*see SII Method of Assessment Reporting*).

### **Concluding Thoughts**

The facilitation template provides an organized format to promote the use of a plan. It will take strong discipline to complete the template for each class, especially the *during* and *after* activity portions. Faculty who do complete facilitation plans are often motivated by the opportunity to use a portfolio of these plans as research for publication and/or to enhance their tenure applications.

### **References**

- Millis, B. J., & Cottell, P. G. (1998). *Cooperative learning for higher education faculty*. Phoenix: Oryx Press.
- Johnson, D. W., & Johnson, F. P. (2003). *Joining Together: Group Theory and Group Skills*. Boston: Allyn and Bacon.

## Facilitation Plan *(prior to class)*

1. **Outcomes** *(List outcomes and describe anticipated evidence that each has occurred.)*

2. **Activity Type**

3. **Roles**

4. **Student Preparation Assessment Plan**

5. **Activity Set-up**

time allotted\_\_\_\_\_

6. **Group Work**

time allotted\_\_\_\_\_

*Identify issues that may affect performance, link them to learning skills, and describe your anticipated response*

Situation

Skill

Intervention

Cognitive:

Social:

Affective:

7. **Closure**

time allotted\_\_\_\_\_

## Facilitation Plan *(during/after class)*

### 8. Activity Set-up Notes

time spent\_\_\_\_\_

### 9. Group Work Notes

time spent\_\_\_\_\_

Situation

Skill

Intervention

Result

### 10. Closure Notes

time spent\_\_\_\_\_

*Notes from oral reports if used*

### 11. Reconciliation

*What evidence demonstrates outcomes were met? Use data from group work to document.*

### 12. SII of class period