Title
CAPACITY BUILDING

Subtitle
A frame work for professional, organisational and institutional development[1]

SUMMARY

This paper elaborates further on the various aspects of professional, organisational and institutional development in capacity building.

1. GENERAL DEFINITION OF CAPACITY BUILDING

The process by which individuals, groups, organisations, institutions and societies increase their abilities to:

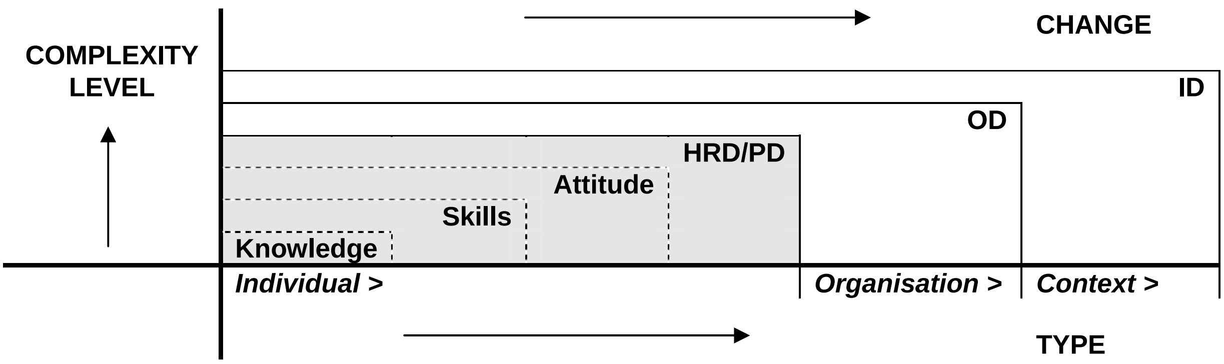
- Perform core functions, solve problems, define and achieve objectives
- Understand and deal with their development needs in a broad context and in a sustainable manner.

2. LEVELS OF CAPACITY BUILDING

Within the capacity building process three levels and three types of capacity building can be distinguished with increasing complexity, starting at the individual level:

1. **Individual level**
   Human Resource Development (HRD) or Professional Development (PD):
   The improvement and maintenance of the human resources of the organisation
2. **Organisation Level (internal)**
   Organisational Development (OD):
   The sustainable strengthening of the internal capacity of the organisation to (better) enable her to achieve her goals and accomplish her mission
3. **Context level (external)**
   Institutional Development (ID):
   The development and influencing by factors and actors of the wider environment, in which the organisation operates

Schematically:



[1] Adapted from "Monitoring and Evaluation of Capacity Building. Policy and Instruments; A PSO Manual", PSO/Arcadis, The Hague, March 15, 2004, (www.pso.nl/knowledgecentre/)

3. TYPES OF CAPACITY BUILDING

HRD/PD: Human Resource Development or Professional Development

HRD refers to the improvement and maintenance of the quality of personnel within an organisation (human resources), i.e. that the staff develop sufficient knowledge, skills, attitude and motivation, and apply these to their work within the organisation. At this level, capacity building involves aspects such as gaining information and insight, changing perceptions, accepting values, practical skills, attitudes and style.

However HRD also has a cultural dimension and reflects how the staff of the organisation, or more specifically her value, is perceived in conventional management concepts. In that sense professional development (PD) is more neutral.

It is more appropriate to use PD, when the focus of capacity building is on professionals[2].

OD: Organisational Development

OD refers to the sustainable strengthening of the internal capacity of (parts of) an organisation, thus making it better able to achieve its objectives and fulfil its mission. This does not initially mean increasing the quality of the staff, although this does form part of the theory, but on strengthening the systems and processes within the organisation.

ID: Institutional Development

Organisations do not operate in a vacuum, but must be able to relate to their surroundings. They therefore need to maintain, exert influence and, where necessary, to adapt to changing circumstances.

ID refers to the development and influencing of this wider context in which organisations operate: a network, a sector, legislation and regulations (rules of the game), 'the political situation', a population, society as a whole, and the surrounding culture. Only when organisations are embedded in this wider context and exert influence will they be able to survive and have any impact. Institutional development, in this context, is also a condition for strengthening individual organisations.

---

[2] The meaning of professionalism can be described as follows:

1. Choice

The professional chooses *consciously* for his/her profession. It shows motivation and ambition for professional development and excellent performance.

2. Vision on his/her profession

The professional has a vision on his/her profession in terms of the *development* of it and the *context*. As such he/she knows how this discipline relates to other disciplines.

3. Theoretically / methodically founded

The professional has a clear *understanding* of his/her theoretical concepts and work methodologies, and is able to *communicate* about it with other professionals from other disciplines. Such professionals can work in interdisciplinary teams. In other words: a professional 'knows what he/she is doing'.

4. Self-managed

The professional is *self-managed* in his/her work and the own professional development. He/she is the *initiator* of wanted/required changes.

4. CATEGORIES OF CAPACITY BUILDING

Within the three types of capacity building a number of categories can be distinguish. Categories can be seen as the outcomes of the capacity building process. From the perspective of the target group of capacity building the categories describe their development needs.

HRD/PD	
Managerial competence	Developing the knowledge and skills necessary, at an individual level, to manage the organisations: policy development, planning, strategic mentality, operational management, financial management, resolving conflicts, M&E, personnel management etc.
Technical competence	Development and application of technical knowledge and skills. This depends on the organisation's working area, e.g. agriculture, education, health care, media etc.
Attitude and motivation	People's behaviour is not only determined by knowledge and skills, but more importantly by their motivation, values, attitudes and expectations. HRD can focus on activating or changing such attitudes and motivation (empowerment)
OD	
Strategy and policy	Long-term planning, translating the mission into specific objectives and approaches.
Learning capacity	The capacity to learn from experience and to couple this to individual policy and implementation.
Structure	Both the formal and informal division and coordination of roles, positions and responsibilities.
System	Internal processes that regulate the functioning of an organisation, e.g. administration, planning, budgeting, accounting, reporting, monitoring, evaluation, learning, etc.
Staff	Activities/rules focusing on use, tasks, motivation, input and development of staff or personnel.
Management	The roles of, and rules for, managers and leaders.
Networking	The capacity to retain and harmonise relationships according to the social actors that are relevant to the organisation.
Culture	The combination of values, principles and styles which are characteristic of the organisation.
Finance	Fundraising, financial planning and accountability.
Technical competence	Capacity and resources to fulfil certain technical tasks, depending on the application and sector.
ID	
Strategic harmonisation	Harmonisation between the various organisations working within a certain region or sector, with the aim of forming a collective external policy.
Operational adaptation	Harmonising programmes and collective programme development.
Learning from the environment	Exchanging knowledge and experience between organisations within a network, which leads to learning processes, whereby the policy and implementation thereof is influenced within the various organisations in a network.
External leverage	The capacity to consider the dynamic context and implement this influence (individually or collectively) towards third parties to defend the interests and develop policies, e.g. towards governments, multilateral institutions, donors, private organisations or other NGOs. These third parties may also be less tangible institutions, such as the market and regulations.

5. INTERVENTIONS FOR CAPACITY BUILDING

1. Exchange
The exchange of knowledge, experience and persons forms a possible strategy in achieving capacity building. It is important to ensure that there is a real interaction and follow-up, which can occur in several ways:

- Working visit by one or more members of staff, over a limited period, to a comparable northern or southern organisation/company.
- Deploying one or more members of staff, over a limited period, to a comparable northern or southern organisation/company.
- Allowing one or more members of staff to participate in a conference or seminar.

Virtually exchanging knowledge and lessons learned via various communications media (the internet, printed publications, video, radio, etc).

2. Facilitation
Facilitation can occur at various points in the capacity building process. For example, it may be necessary to study the initial problem analysis with the assistance of an independent external consultant.
Facilitation usually assumes that both the clarification of the question and the start of the solution are present within an organisation or network of organisations. In order to encourage the knowledge-sharing and development process, a facilitator can mobilise the knowledge and capacity already present. The facilitator therefore acts as a *catalyst* for knowledge exchange and development.
Facilitation can focus on a limited subject within the organisation (e.g. ‘how can we strengthen our financial sustainability?’) or on a more integrated organisational development approach, where an analysis of the entire organisation is required.

3. Coaching
Coaching is a structured form of process support of an individual or small group or staff from an organisation or network (supervision/intervision) by a process-supervision expert or someone from a peer organisation with such expertise.
Coaching is usually seen as an intensive form of personal supervision that works as a catalyst in the development of that individual or team.
Coaching is almost always used to encourage personal growth and development. The main objectives concern the way in which the person functions within his/her own job description and/or the organisation.

4. Research
Two types of research can be distinguished:
a. Research that benefits capacity building
Research can form a strategy for strengthening the primary processes or organisations.
Organisations always need information on which to make operational decisions. In some cases this requires in depth research as well as good monitoring information. If this is to contribute to capacity building then it must be clear from the start how the research results will be used to strengthen the organisation/networks of organisations.
b. Research on capacity building
Experience gained in the capacity building process is often interesting and could be useful to others. Systematic research can therefore contribute to the capacity development of third parties.

5. Training
Training can concern either the entire staff of an organisation, or a group of staff, or individuals within the organisation or network of organisations. There are various types of training, e.g. ‘in/out company’ training and ‘on the job’ training. In some cases training will take a more educational

form. The value of training is generally recognised in various areas: gaining skills and knowledge, both to benefit the organisation/network and to personally benefit the trainee.
Training can also strengthen the mobility within the organisation and can motivate the staff members involved.

6. Advice

Advisory services can refer to a specific aspect, such as advising on the organic cultivation of crops.
These advisory services may take place at the organisational development level, e.g. creating, detailing and setting up a monitoring system, or can focus on supporting the programme formulation of one or more partner organisations. This strategy makes use of the specific up-to-date knowledge of an external advisor.
Advisory services often form part of a longer-term project, where the partner organisation is developing new insights based on feedback from an external consultant. Advice is thus provided at clearly agreed times, as input into a process that is supervised from within the partner organisation. This may include 'remote' (i.e. off-site) advisory services.

7. Management

Activities within the primary process of the organisation, such as management, do not directly contribute to capacity building, yet management (as a strategy) plays an important role in capacity building within an organisation, as it can set the conditions. For example management can be relevant in cases where local management capacity is temporarily insufficient to guarantee that an organisation can maintain its primary process, while trying to strengthen its own capacity.
However, such a period of interim management (or trouble-shooting) must be as short as possible, and the focus must remain on training local management staff, so that a more sustainable solution can be achieved.
A second form of temporary management concerns coordinating large programmes or sector plans, where it is important that capacity building processes are harmonised. This sometimes requires a temporary, separate coordination.

8. Implementation

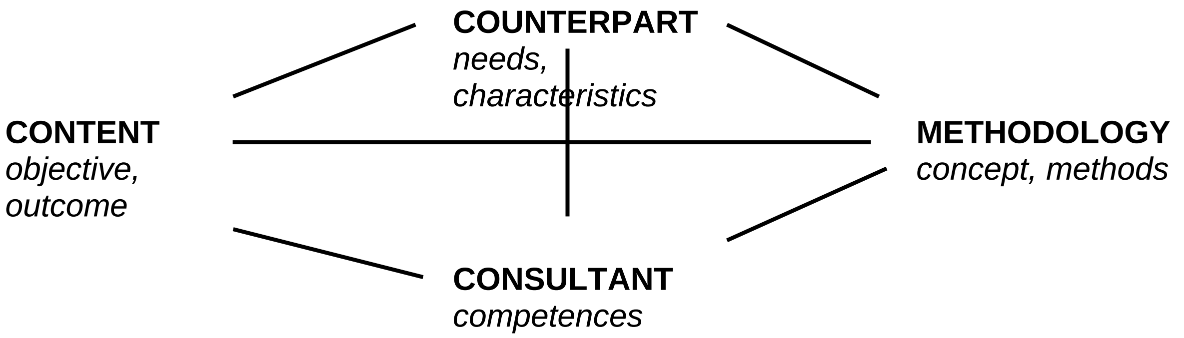
Just as with management, the strategy 'implementation' (i.e. taking direct responsibility for the primary process) does not lead to capacity building. However, investing in implementation can sometimes be a prerequisite to allowing other capacity building strategies to be achieved or, as previously described, for undertaking a learning process. Implementation should therefore be embedded in a wider strategy and be of a temporary nature.
The only exceptions to this rule are situations where, from a humanitarian point of view, support is required due to a structural lack of local capacity. In such cases this strategy would only be temporary and should be accompanied by a clear phasing-out strategy.

6. DESIGN OF CAPACITY BUILDING PROCESSES

The planning of a capacity building process is directly linked to the planning of the activity for/during which capacity is build. It's the combination of 'learning to do' (action learning) and learning by doing that determines which capacities are needed by the counterpart (partner, stake holder, staff member, participant, etc) in a certain stage of the process.

It is crucial to see there fore that the design of capacity building is always 'situational', depending on the specific context, needs and objectives, characteristics of the counterpart, culture.

To design a capacity building process it has at first to be broken down in needs and objectives per stage. Secondly the capacity building can be designed for each stage, where the design is the match between the different elements:



At the beginning of the capacity building the consultant initiates and structures the design. During the capacity building process, when the learning skills of the counter part are improving because of the 'learning to learn', the design becomes more and more the responsibility of the counterpart.

	PRACTICALITIES
Further reading	• IRC-FN: Facilitation of Capacity Building in RCD program • 'Monitoring and Evaluation of Capacity Building. Policy and Instruments; A PSO Manual", PSO/Arcadis, The Hague, March 15, 2004, • www.pso.nl/knowledgecentre
Source	Compiled by Patrick Boel, with thanks to Tunde Adegoke. May 2006

Title	FACILITATION
Subtitle	*A frame work for the underlying concepts of facilitation in capacity building*

SUMMARY

A paper, which elaborates further on the underlying concepts of facilitation in capacity building.

1. INTRO

A facilitator is not a manager and facilitation isn't the same as project management. A facilitator isn't a teacher. It's confusing when the director claims that he is facilitating the organisation.
Can a stake holder be a facilitator? Needs facilitation to be participatory?
Does facilitation requires specific competences? What are appropriate methods to facilitate?
It is much easier to say what it is not, then what it is.

Depending on the context people define facilitation very broad, or just very narrow.
This paper is written with the idea to accept that many activities are labelled as facilitation and that we should not waste energy to fight over the 'correct' definition. What we strive for is to provide a frame work for the various aspects of facilitation and the many types and roles of the facilitator. Such a frame work can help to define what concepts, methods, tools, styles, skills and knowledge are necessary in a specific situation.

2. PURPOSE OF FACILITATION

The general purpose of facilitation is:

To enable a process of capacity building in a combination of problem solving and action learning.

Facilitation, as a way of working, reflects the values of IRC: respect, transparency, openness, solution oriented, innovative, sharing and sustainability.

3. CAPACITY BUILDING

The general definition of capacity building is:

The process by which individuals, groups, organisations, institutions and societies increase their abilities to:

- *Perform core functions, solve problems, define and achieve objectives*
- *Understand and deal with their development needs in a broad context and in a sustainable manner.*

Or simply said: the concept of capacity building links problem solving and action learning: learning to **do**, rather then to **know**.

It is crucial to see that capacity building is always 'situational', depending on the specific context, needs and objectives, characteristics of the counterpart, culture.

We can distinguish three types of capacity building:

1. Human Resource Development (HRD) on the individual level
2. Organisational Development (OD) in the organisation level (internal)
3. Institutional Development (ID) on the context level (external)

Within each type of capacity building we can distinguish categories, such as:

- managerial and technical competence, motivation and attitude in HRD
- strategy, finance, learning capacity and management systems in OD
- operational adaptation, learning from the environment and external leverage in ID

4. FACILITATION OF CAPACITY BUILDING

To achieve capacity building there are a number of interventions/strategies: exchange, facilitation, coaching, research, training, advice, management, implementation. It depends on many factors, which intervention is appropriate in a given context.

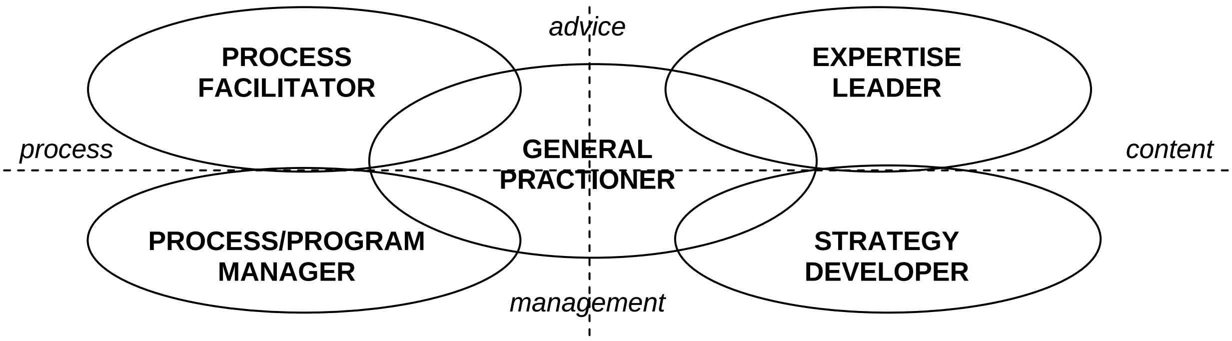
In the intervention ‘facilitation’ the consultant acts as a *catalyst* for knowledge exchange and development, assuming that both the clarification of the question and the start of the solution are present within an organisation or network of organisations. In the IRC context consultants combine different types of interventions, but the use by them of the general term ‘facilitation’ better reflects the intention of a participatory approach.

5. FACILITATOR

As mentioned earlier the terms facilitation and facilitator are used in a very broad meaning in the IRC context. Looking at it from the perspective of the consultant, facilitation includes a range of roles and activities, which can be characterised on various scales. To name a few:

- process oriented <-> content oriented
- people oriented <-> task oriented
- participatory <-> directive
- advice <-> management

For more complex, long term development processes in cooperation with one or more partners, five roles can be distinguished[1]:



The preferred roles in the IRC context are more reflected in the upper-left of the diagram, to be characterised in a broad sense as facilitator.

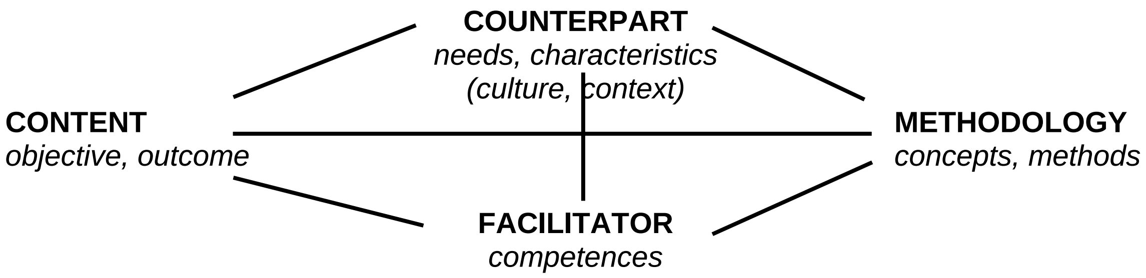
The main purpose of the categorisation is to enable the facilitator to identify and select the appropriate roles in a given situation. Better role awareness of the facilitator also helps to improve performance and professional development.

[1] Adapted from ‘SNV’s Advisory practice’. July 2002.

6. DESIGN OF CAPACITY BUILDING PROCESSES

The planning of a capacity building process is integrated in the planning of the activity. It's the combination of learning to do and learning by doing that determines which capacities are needed in a certain stage of the work process.

To design a capacity building process it has at first to be broken down in needs of the counterpart (partner, stake holder, staff member, participant, etc) per stage. Secondly the capacity building can be designed for each stage, where the design is the match between the different elements:



At the beginning of the capacity building process the facilitator initiates and structures the design. During the capacity building process, when the learning skills of the counter part are improving because of the 'learning to learn', the design becomes more and more the responsibility of the counterpart.

The facilitator needs enough content expertise and general training expertise to be able to design the capacity building process.

7. CONDITIONS FOR FACILITATION

There are a number of aspects, which can be taken into consideration to define the necessary conditions for successful facilitation:

- commitment for openness and sharing among the involved people and organisations
- willingness to think 'out of the box' and to change
- benefits for partners / stake holders
- competence, neutrality, independency and credibility of the facilitator
- legitimacy and respect for the facilitator

It will depend on the situation how the partners/ stake holders weight the importance of the various aspects and how they assess them. The facilitator can address these topics when planning the capacity building process with the partners/stake holders.

	PRACTICALITIES
Further reading	• IRC-FN: Facilitation of Capacity Building in the RCD program • IRC-FN: Capacity Building • IRC-FN: Facilitator • IRC-FN: Facilitation of Learning • SNV's Advisory practice'. SNV, The Hague, July 2002 • 'Monitoring and Evaluation of Capacity Building. Policy and Instruments; A PSO Manual", PSO/Arcadis, The Hague, March 15, 2004, • www.pso.nl/knowledgecentre
Source	Compiled by Patrick Boel, with thanks to Tunde Adegoke. June 2006

Title	**FACILITATOR**
Subtitle	*A framework for the roles and competences of the facilitator in capacity building*

SUMMARY

This paper elaborates further on the various roles and competences of a facilitator in capacity building.

1. INTRO

Depending on the context people define facilitation very broad, or just very narrow [1]. Instead of fighting over the 'correct' definition, it is assumed better to accept that many activities are labelled as facilitation. Facilitation, as a way of working, reflects the values of IRC: respect, transparency, openness, solution oriented, sharing, participatory.

The purpose of this paper is to provide a frame work for the many types and roles of the facilitator. Such a frame work can help to define what styles, skills and knowledge are necessary in a specific situation.

2. PURPOSE OF FACILITATION

The general purpose of facilitation is:

To enable a process of capacity building in a combination of problem solving and action learning.

The general definition of capacity building is:

The process by which individuals, groups, organisations, institutions and societies increase their abilities to:

- *Perform core functions, solve problems, define and achieve objectives*
- *Understand and deal with their development needs in a broad context and in a sustainable manner.*

It is crucial to see that capacity building is always 'situational', taking into consideration the specific context, needs and objectives. As a consequence the purpose and way of facilitation and the role of the facilitator are also situational. Some examples of such situations:

- consultancy
- individual learning process in a training
- organisational development of a partner organisation
- collaboration between organisations
- program management

A thorough analysis of the situation is necessary to define the needs for capacity building and the appropriate type of facilitation.

3. FACILITATOR ROLES

As mentioned earlier the terms facilitation and facilitator are used in a very broad meaning. Two commonly used ways to look at it could be helpful to be more specific about the different facilitator roles.

a. individual advisory relationship

Looking at it from the perspective of the consultant, facilitation includes a range of roles and activities, which can be characterised on various scales. To name a few:

- process oriented <-> content oriented

[1] This observation stems from discussions and workshops in the RCD section in 2004 and 2005, experiences from country managers in the RCD program and the IRC conference on Learning Alliances in June 2005.

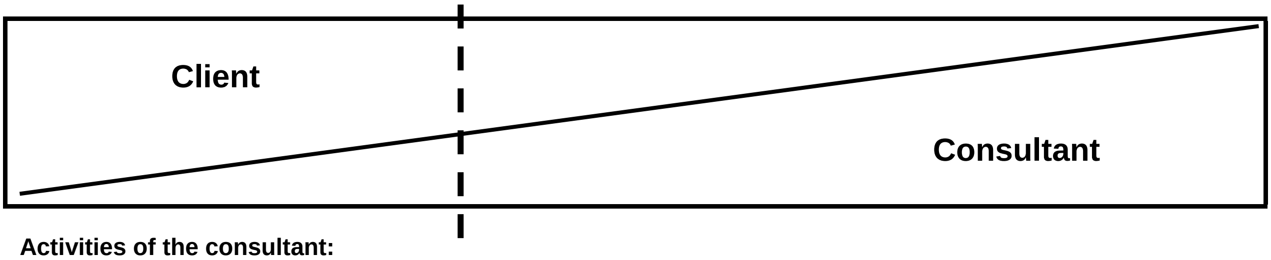
- people oriented <-> task oriented
- participatory <-> directive

In the following continuum there is a gradual shift in the relationship and cooperation between the client and the consultant.

Process, people oriented | **Content, task oriented**

Roles of the consultant:

objective observer, reflector	process counsellor	fact finder	alternative identifier and linker	joint problem solver	trainer, educator	informational expert	advocate, instructor



Activities of the consultant:

raising questions for reflection	observing process, raising issues, mirroring feedback	gathering data, stimulating thinking, interpreting	identifying alternatives & resources, helping assess consequences	offering alternatives, participating in decisions	training	regarding, linking, and providing policy and practice decisions	proposing guidelines, persuading, directing

Participatory | **Directive**

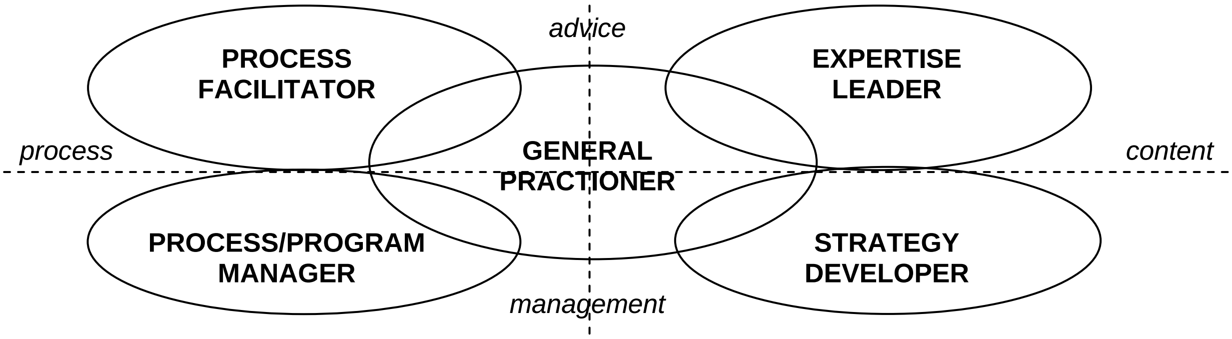
--- = division of work between counterpart and consultant in a particular situation

b. complex processes

In more complex, long term development processes in cooperation with various partners and stake holders often a combination of roles is required, which can be distinguished along two axes:

- process <-> content
- advise <-> management

Schematically this results in a diagram with 5 roles[2]:



See the annex for a more detailed description of these facilitator roles.
The preferred roles in the IRC context are more reflected in the left part of the continuum or the upper-left of the diagram, to be characterised in a broad sense as facilitator.

The main purpose of the categorisation is to enable the facilitator to identify and select the appropriate roles in a given situation. Better role awareness of the facilitator also helps to improve performance and professional development.

[2] From ‘SNV’s Advisory practice’. July 2002.

4. FACILITATOR REQUIREMENTS

A number of areas of expertise can be distinguished, which are required for the various facilitator roles. However the required level of expertise is very much situational.

Process knowledge
- Capacity building processes and interventions for HRD, OD and ID.
- Action learning and interactive training (design, methods, tools)
- Participatory planning

Content expertise
- The content as such, related to the problem / task at hand, such as sanitation, water management, not-for-profit business, organisational development, knowledge management, networking
- The socio-economic, cultural and political context.

Skills
- Process design and management in more ‘fluid’ processes with ambivalence
- Communication (listening, dialogue), trust building and mediation
- Consultancy and training skills

Attitude / behaviour
- Openness and respect, cultural sensitivity, integrity
- Professionalism (see annex for a description of professionalism)
- Dedication and drive, commitment to the stake holders / participants (shared values)
- Maturity

IRC has developed a list of core competences (see annex), which can be used to define profiles for the various types of facilitators. Within each profile a selection can be made of core competences and the level of competence.
The attitude/behaviour is seen as a decisive criterion.

	PRACTICALITIES
Further reading	• IRC-FN: Facilitation of Capacity Building in RCD program • IRC-FN: Capacity Building • IRC-FN: Facilitation • SNV Advisory practice. July 2002
Source	Compiled by Patrick Boel, with thanks to Tunde Adegoke. May 2006

ANNEX: FACILITATOR ROLES

Complimentary facilitator roles in complex processes

General practitioner
- Combines thematic knowledge with change knowledge.
- Is an able advisor, clearly result oriented.
- Maintains relation with partners and stake holders for own tasks and manages own activities by balancing expectations, needs, innovation and efficiency considerations.
- Maintains standards of advisory practice and its management. Promotes collaboration and contributes to work culture, relationships and atmosphere.
- Shares insights and approaches in relation to content, processes, relations and strategy/business development.

Process facilitator
- Assists the partner in holding the overall process that the partner is undertaking.
- Holds the day-to-day relationship with the partner, to ensure effective division of roles and tasks, coordination and to clarify mutual expectations. Responds to (changes in) partner demand.
- "Manages" and coordinates the support of the process with the partner. Monitors, steers and adjusts the support. Ensures attracting relevant expertise, effective distribution of roles and relevant administrative aspects.
- Leads a team of professionals in mutual coordination, cooperation and enthusiasm. Inspires all with a clear vision of achievement and expected contributions. Gives space to the expertise of others. Facilitates learning and the continuous improvement of team functioning.
- Raises possibilities for broader positioning of partners and own organisation in the sector.

Expertise leader (specialist)
- Provides "specialist" advice in knowledge area(s)
- Defines and upholds quality standards for knowledge area.
- Contributes to practice development, through effective communication & learning.
- Develops knowledge area, innovates and initiates, and promotes this throughout own organisation.
- Contributes to external positioning of expertise of the own organisation.

Process/program manager
- Coordinates the total package of relations that exist within a process/program and acts as the formal "contract holder" towards the partners and stake holders in cooperation with the day-to-day process facilitator.
- Facilitates the allocation of resources / time. Coordinates internal preparation and decision-making with regard to changes in process/program, allocation of resources/time, contracting etc.
- Develops and shares broader understanding of the context.
- Creates new and maintains existing contacts in view of present and future work. Is aware of relevant issues and opportunities. Develops a network in which new activities can emerge.
- Pro-actively coordinates activities in line with needs. Keeps colleagues up to date on recent developments and vice versa.

Strategy Developer
- Follows the developments in a certain area of work (knowledge area, geographic area, type of interventions) and interprets these in terms of opportunities or implications for the organisation.
- Develops new lines of thinking on work in response to opportunities and demands.
- Produces materials and proposals to this extent.
- Ensure that the organisation is viewed as a high quality advisor in specific areas. Maintains relevant networks.
- Supports management and development of partner relations. Provides an active contribution to developing and transferring new development approaches.

ANNEX: CORE COMPETENCES IRC

Summary from IRC core competences book of October 2002.

1. **Professional competence**
   Using professional knowledge and skills to make an active contribution to a common result or to solving a problem and producing good quality results, even when collaboration has no direct relevance to the employee's own work
2. **Knowledge Development**
   Implementing and/or guiding activities that generate knowledge and information products.
3. **Knowledge Sharing**
   Transferring and (facilitating of) sharing explicit and implicit knowledge to target audiences.
4. **Vision and strategy development**
   Contributing to the development of a vision and strategy for (a part of) the institute or partner institutes by preparing and implementing realistic plans. Focus on core issues and long-term policy and ability to distance oneself from daily routines. Recognition and combination of internal and external developments with own vision in order to form a concise strategy for the future.
5. **Innovation**
   Identifying, considering and initiating opportunities for existing and new services/products.
6. **Initiative**
   Approaching, assigning and developing activities.
7. **Networking**
   Establishing and maintaining functional relationships (internal and external) which contribute to achieving the institute's objectives.
8. **Learning**
   Applying and internalising new ideas and concepts so as to achieve personal and professional development in the context of the organisation.
9. **Adjusting approach and behaviour**
   Adjusting own style, conceptual approach and behaviour to changing demands and circumstances.
10. **Taking responsibility**
    Taking decisions and accepting responsibility for the consequences of these decisions. Systematically setting targets and priorities and specifying actions, time and means required for achieving specific targets.
11. **Client focus**
    Assessing needs and requirements of internal and external clients and demonstrating ability to act accordingly. Anticipating requirements, prioritising services and ensuring client satisfaction.
12. **Proficiency**
    Communicating ideas and opinions to others in correct English in an understandable way. Spoken and written communications matching vocabulary and terminology of the listener or reader.
13. **Coaching**
    Stimulating and guiding development of staff and colleagues in such a way that this contributes both to the goals of the organisation as a whole and of the individual staff.
14. **Planning & Monitoring**
    Managing and controlling tasks, projects, processes and resources in such a way that results are achieved that contribute to the realisation of the goals of the organisation.
15. **Communication**
    Applying an open dialogue with clients and colleagues that contributes both to the objectives of the organization and allows for personal growth
16. **Negotiation skills**
    Come to an agreement when there are different views, opinions and arguments. Make goals and interests of people involved clear and achieve desired negotiating result.

ANNEX: PROFEESSIONALISM

The meaning of professionalism can be described as follows:

1. Choice:
The professional chooses *consciously* for his/her profession. It shows motivation and ambition for professional development and excellent performance.

2. Vision on his/her profession:
The professional has a *vision* on his/her profession in terms of the development of it and the context. As such he/she knows how this discipline relates to other disciplines.

3. Theoretically / methodically founded:
The professional has a clear *understanding* of his/her theoretical concepts and work methodologies, and is able to *communicate* about it with other professionals from other disciplines. Such professionals can work in interdisciplinary teams. In other words: a professional 'knows what he/she is doing'.

4. Self-managed:
The professional is *self-managed* in his/her work and the own professional development. He/she is the *initiator* of wanted/required changes.

Title	**ADULT LEARNING**
Subtitle	***Special aspects of the way adults learn***

SUMMARY

A short paper, describing some special aspects of adult learning and the consequences for the design of training.

1. ADULT SELF-CONCEPT

For reasons which may be social, physical or psychological, many adults do not feel at home in a learning situation, despite a willingness to learn: They may:

- believe that learning is for children and adolescents, not for adults,
- be afraid of being seen as in need of education,
- be anxious that they may not be able for a particular course or their ignorance may be discovered, and/or
- dislike being members of a learning group where other members appear more confident or more competent.

By showing *respect* for their maturity and independence, and for the breadth and depth of knowledge they have gathered from experience, the trainer boost their confidence and creates a more open, equal relationship. He will be more respected if he is recognised as a co-learner, facilitator, guide and mentor rather than as a teacher or trainer who uses an almost prescriptive approach or method.

The trainer should be aware that the depth and breadth of his knowledge, skills and expertise may unconsciously emphasise the ignorance of the trainee and prove that he is superior to them.

Encouragement is vital to adult learners. Regular *feedback* on completed tasks or assignments and genuine interest in their findings tend to increase the confidence and enhance the motivation of the trainees.

2. MOTIVATION

Most adult learners are better motivated than their young counterparts. Many of them attend courses voluntarily; some have to sacrifice both time and money to do so. Almost all are willing and eager to learn, even if they doubt their own ability to do so.
If the trainer matches the motivation of the trainees, it stimulates all.
Shoddiness in either preparation or delivery will not be tolerated by mature and highly experienced adults.

3. MEANINGFUL LEARNING

Adults learn for today. They learn most effectively when it recognised as being of *interest* to them, is of *immediate use* and is related to the *real* world.
This has emphasis on the aim and structure of the course, the subject and the tasks. It works best to build new knowledge and skills on existing experience of the trainees.

4. ACTIVE PARTICIPATION

The learner must be active in order to learn.

Discussion of the course at the beginning can be a very effective way of clarifying issues and of deciding strategies to be followed. Trainees like to know what the course demands of them. It enables the trainer to reduce fears of inhibitions and to anticipate any necessary restructuring.

Opportunities for active participation gives the trainee chances to express their own views on theories and practices. Such views will be based, quite frequently, on practical experiences and will lead to further questioning and other learning activities.

A break for questions, discussions, reflection and activities prevents loss of attention. Trainees quite enjoy commenting on what a particular topic has meant to them and what the practical implications of the topic might be for them.

5. PACING

Adults, as distinct from younger people, tend to:

- be more cautious and deliberate about tasks they undertake,
- prefer to perform a task correctly and to the highest standard possible, and
- be less concerned about how long it will take them to accomplish a certain task.

Therefore there should be enough time for preparing and performing the task and discussion of the learn experiences. It might be useful to discus planning and deadlines with the trainees.

The trainer may have to adjust the pace of the course to accommodate the trainees.

6. ACTION LEARNING

Because of previous experiences trainees may not be used to a type of training that expects of them *active participation*, *responsibility* for their own learning and *mutual exchange* of own information, knowledge and experience.

One of the aims of action learning is to improve 'learning to learn'. It might be useful to explain at the very beginning the principles of action learning, to give each time clear instructions for any assignment and check if they are understood sufficiently, and to take time for practising learning skills.

	PRACTICALITIES
Further reading	• IRC-FN: Facilitation of Learning • IRC-FN: Design of training • (Links to web sites)
Source	Patrick Boel June, 2006

CULTURAL DIMENSIONS

Seven dimensions can be distinguished in the way in which different cultures solve their problems, sorted in three categories:

I. RELATIONSHIPS WITH PEOPLE

1. Universalism versus particularism

The universalist approach is roughly: "What is good and right can be defined and always applies."
In particularistic cultures far greater attention is given to the obligations of relationships and unique circumstances. Less attention is given to abstract social codes.

2. Individualism versus collectivism

Do people regard themselves primarily as individuals or primarily as part of a group? Furthermore, is it more important to focus on individuals so that they can contribute to the collective as and if they wish, or is it more important to consider the collective first since that is shared by many individuals.

3. Neutral or emotional

Should the nature of our interactions be objective and detached, or is expressing emotion acceptable?
Do emotions confuse the issue or are they appropriate in business relationships?

4. Specific versus diffuse

When the whole person is involved in a business relationship there is a real and personal contact, instead of the specific relationship prescribed by a contract. In many countries a diffuse relationship is not only preferred, but necessary before business can proceed.

5. Achievement versus ascription

Achievement means that you are judged on what you have recently accomplished and on your record. Ascription means that status is attributed to you, by birth, kinship, gender or age, but also by your connections (who you know) and your educational record.

II. TIME

6. Attitude to time

In some societies what somebody has achieved in the past is not that important. It is more important to know what plans they have developed for the future. In other societies you can make more of an impression with you past accomplishments than those of today.
Time can be perceived as passing in a straight line, a sequence of disparate events. Or as moving more in a circle: the past and present together with future possibilities. This makes considerable differences to planning, strategy, investment and views on home-growing your talent, as opposed to buying it in.

III. ENVIRONMENT

7. Attitudes to environment

Some cultures see the major focus affecting their lives and origins of vice and virtue as residing within the person. Here, motivations and values are derived from within. Other cultures see the world as more powerful than individuals. They see nature as something to be feared or emulated.

FUNDAMENTAL PARADIGM IN MANAGEMENT

Determinism	**Holism**
Analytic	Synthetic
Rational	Intuitive
Linear	Circular

Western culture is very technology oriented, based on a deterministic science philosophy. From that comes the conceptual thinking about organisations as "machines".
Other cultures see organisations as a "social groups". To understand the functioning of these a more holistic approach is necessary.

Adapted from:
"Riding the Waves of Culture. Understanding Cultural Diversity in Business." Fons Trompenaar; Nicholas Brealey Publishing Limited, London, 1993

Title
DESIGN OF TRAINING
Subtitle
Principles for designing a training program

SUMMARY

An overview with the general principles for designing a training program (or any type of group intervention), to use by the facilitator as a checklist for the preparation.

1. BASIC CONCEPTS FOR TRAINING

The design of a training is based on various concepts for learning and training. Three mayor ones are:

- **Action** learning: learning to **do** rather then to know
- **Team** learning: learning from and with the other participants
- **Facilitation** of the learning process by the trainer: participatory, interactive

2. LEVELS OF LEARNING

During a training one can in general learn on three levels:

1st Content/subject (knowledge, skills, tools)
2nd Methodology (as used in the training)
3rd Personal (personality, behaviour)

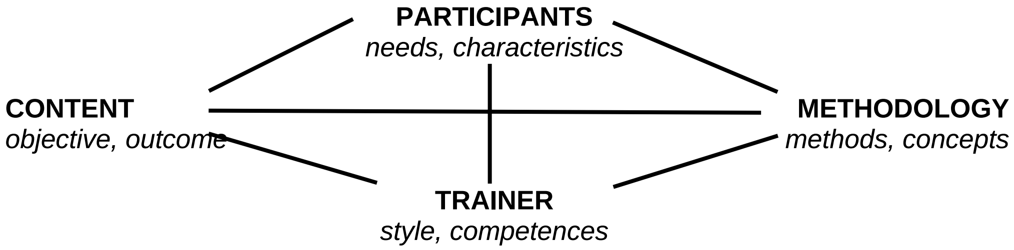
Awareness of this three levels enhances the learning opportunities. Even those, who are already familiar with the content, can learn new things on other levels.

3. DESIGNING A TRAINING PROGRAM

The design of a training program is an iterative process to reach a match between:

- needs of the **participants** and their characteristics
- **content** of the training in terms of objectives, subject and outcome
- concepts, **methods** and tools
- style, personality and competences of the **trainer**

Schematically:



4. STEPS IN DESIGN PROCESS

Key steps in the design process are:

Step 1. Participants

Thorough analysis of:

Needs

- Needs as a result of new tasks, activities, changing circumstances
- Expectations in terms of training process and results/outcome

Characteristics
- Present level of knowledge, skills and experience.
- Present learning styles, skills and motivation.
- Other relevant characteristics (age, gender, culture)

Step 2. Content

Clearly and shortly define (without too much explanation):
- Content of the training
- Objective and results/outcomes ('participants will be able to …').
- Criteria for verification if objectives are met.
- Criteria for good performance of participants.

Step 3. Methodology
- Breakdown of training in time (sessions) and content.
- Choosing training methodologies, depending on:
  - Qualifications and characteristics of *participants*.
  - Objectives and *content* of the training sessions
  - Style, competences and experience of *trainer*.
- Adjust the pacing
  - Enough time for preparing and performing tasks/assignments.
  - Enough time for discussing outcomes and learning experiences.

Step 4. Assessment participants /Evaluation training

Depending on the type of training less or more time is spend on assessment and evaluation, as part of the training and/or afterwards.
- Topics, criteria
- Method and procedure

It requires normally quite some back and forward in this process before finalising the design.

5. OTHER FACTORS

When designing the training program other factors are:
- Terms of reference for the training and the trainer
- Budget, time, deadlines
- Size of the group
- Room (size, setting, windows, curtains, atmosphere, light, location)
- Equipment (flip chart, beamer, video, music, pin boards, etc.)
- Materials (pencils, markers, paper, sheets etc.)
- Breaks / refreshments

	PRACTICALITIES
Further reading	• IRC-FN: Facilitation of Learning • IRC-FN: Adult Learning • (Links to web sites)
Source	Patrick Boel June, 2006

Title
END OF TRAINING

Subtitle
Transition from the training into day-to-day life.

SUMMARY

The last session is an important element in a training or workshop to have a good closure and a smooth transition back into day-to-day life. There are a number of ways to fill in the key topics of this last session.

DESCRIPTION

Introduction

The last session is an important element of a training or workshop. It pays special attention to a good closure and a smooth transition back into day-to-day life. When a training or workshop has to end in a hurry and leaving an open end, participants might go home feeling unsatisfied and not at ease.

Objectives

To bring the training to a satisfying end.

Output

- Loose ends are tied up
- A feeling of real achievement.
- Confidence to go back to day-to-day life / work.

Topics

Main topics to address are: evaluation, transition, follow-up, coming home, closure.

WHEN TO USE

Situation

At the end of a training, especially when the group has been together for more then one day. Many things also apply to the end of a workshop.

Target group

Time

30 – 60 min.

PROCESS

Introduction

- Explain the objective and programme for the session.
- Check with the group a closing time that suits everybody (to catch a train, to be home in time, to see people afterwards, to wind down before leaving, etc.)

Evaluation

Conduct an evaluation of the training, using any appropriate method to assess the outcomes and to receive feedback.

Transition

Let participants reflect on the way how they will use / implement the outcomes of the training. Some ways to do that:

Round table

- ‘What factors will serve to *prevent* you from implementing the desired changes?” (e.g.: non-supportive supervision, time pressure, irrelevant material)
- “What steps can you take to increase the likelihood of changing your behaviour?” (e.g.: develop a support group or buddy system, solicit your supervisor’s support, attend follow-up sessions).

Postcard to yourself

- Participants write a postcard to themselves to remind them of what they intend to do "first thing in the morning" after coming home.
- The cards will be mailed to them in a few days.

Letter to yourself

- Participants write a letter to themselves about the outcomes of the training and their ideas/vision for the future.
- The letter is sealed in an envelop with the proper mail address
- The letters will be mailed to them in 4 - 6 months.

Follow-up

Discuss and organise the follow-up of the training to strengthen the impact. Some follow-up activities:

Buddy

- Choose one person to connect with at least once a week during at least four weeks.

	• Exchange experiences with using the outcomes of the training. **Support group** • Form a support group which meets regularly, every four to six weeks. • Work together on questions / problems relating to the implementation of the outcomes of the training. **Follow-up activities** • Announce any planned follow-up activities. • Agree on the reporting of (part of) the training.
Coming home	Present suggestions for what participants could/should do when coming home : • In general be aware that others might have different interests. • See how *they* are. Acknowledgement of what they have done and their experiences during the time that you were participating in the training. • Be aware of their contribution to enable you to go to the training. • Find a time to sit down quietly to share your experiences: not what you have learned of done, but how you are going to use/live it. To build support for your *new* beliefs and behaviour, for what you have become. To reinforce the new things and not the old behaviours. • Find a way to nourish your vision and confirm it. • Keep in mind "what do I want", when then daily routine threatens to take over again. • Do something nice for yourself after having worked so hard in the training.
Closure	Perform some activity with the group, which give participants the opportunity to let go after an intensive (personal) experience with others. Some ways to do it : **Postcard to someone else** • Everybody writes his/her address on a postcard. • The cards are taken in and spread at random among the participants. • Write a 'message' to the other person. • The cards will be mailed in a few days by the trainer. **Presents** • Write on cards suggestions, tips, observations, qualities, etc. for other participants individually. • Give them the cards as a present. • Someone might want to share one or more of his presents with the group. **Inauguration** • Hand-out a diploma of certificate, addressing each participant individually. **Ritual** • Perform a ritual with the group to close the session.
Methods	• IRC-FN: Evaluation Forms • IRC-FN: Feedback • IRC0FN: Incident Method
Tip	Take ample time (at least 30 – 60 min.) for this session. It is important that participants don't go home with the feeling of an open end and unfinished business
Tip	If outsiders will participate in the inauguration ceremony, then make it a separate session.
	PRACTICALITIES
Materials	• Evaluation forms, paper, markers, post-its, cards.
Source	Patrick Boel, June 2006

Title
FACILITATION OF LEARNING
Subtitle
*Facilitation of action learning; learning to **do** rather then to **know**.*

SUMMARY

*A theoretical frame work for action learning (learning to **do**, rather then to know) and instructions for the facilitation of the learning dialogue.*

1. INTRODUCTION

Facilitation of action learning combines two basic concepts for training and learning:

- The consultant as facilitator, who creates a learning environment for experiences and who guides the learning process. Facilitating can be seen as opposite from instructing and teaching.
- Action learning is learning to **do** rather then to **know.**

The objective of this paper is:

- to give the facilitator a theoretical frame work of the action learning process,
- to explain the principles of the learning experience, and
- to provide the facilitator with some tools for the learning dialogue.

As such it focuses on the last part of the learning process.

Not included in this paper are methodologies and tools to create an appropriate environment and experiences for learning.

2. ACTION LEARNING

The essence of action learning rests in the idea that each and every one of us learns best through action. The objective of action learning is two fold:

- to learn from experiences / action and
- to learn to **act** in a situation.

This learning might occur on three levels:

Single Loop Learning

Error-detection-and-correction process, not changing underlying norms, policies and objectives. The criterion for the success of single loop learning is *effectiveness*.

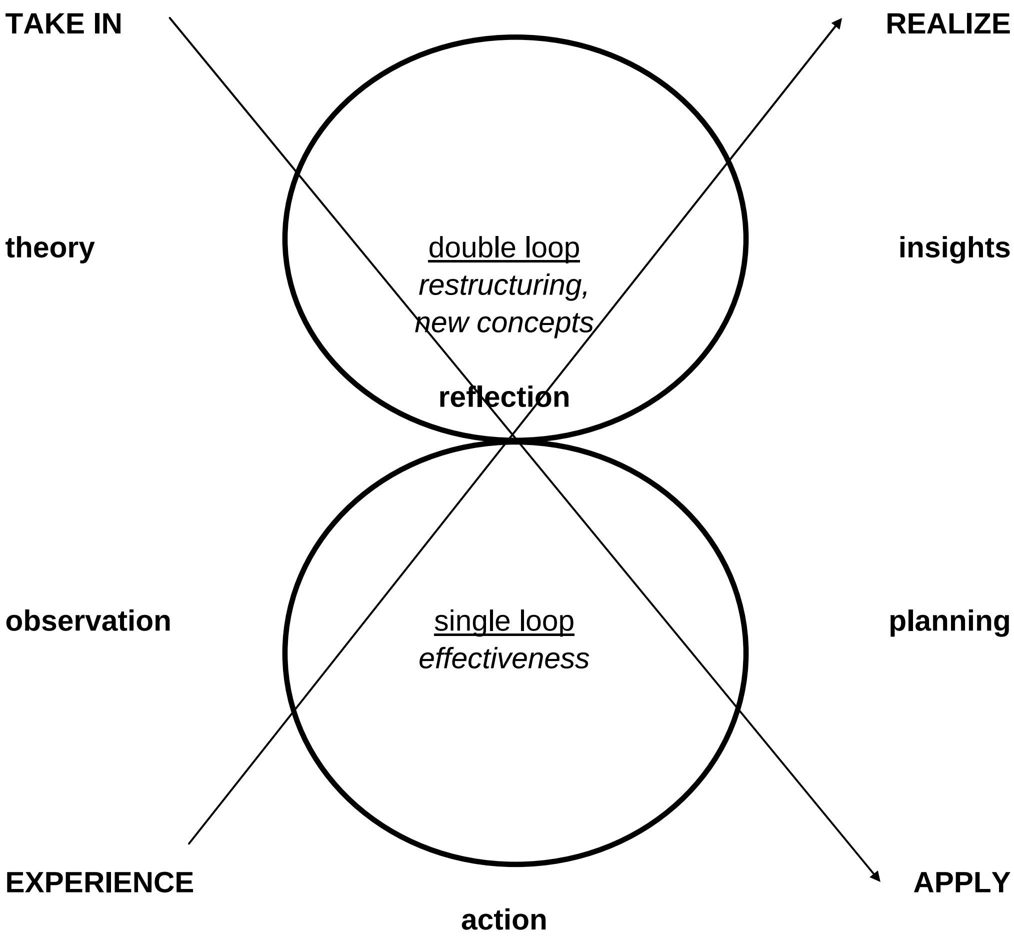
Double Loop Learning

Single loop learning that involves the modification of underlying norms, policies and objectives. Double loop learning resolves *incompatible, conflicting* norms, policies and objectives by setting new ones or by restructuring them.

Deutero Learning (third order learning)

Learning to learn.

The figure on the next page shows the different steps in each loop:



The learning process can start at any point in the lemniscate. However, given the principle of learning to do, learning is most effective if a plan for further action is formulated.
This also explains why each learning experience is an individual, personal experience.

3. ADULT LEARNING

In adult learning there is already a wealthy source of experiences available for learning. The ‘glass’ is already rather full and the facilitator can’t just pour a lot of new knowledge in it.
However, double loop learning is more difficult for adults, because it involves change of patterns, concepts and culture.

For younger people the facilitator has to create an environment in which they can acquire knowledge and gain experiences first, before going into the learning process. But they can more easily be guided into the double loop learning.

4. LEARNING STYLES

In the 'lemniscate' of the action learning process the learning goes along two lines:

INSTRUCTION / ADAPTATION LINE

take in	**>>>>**	**reflection**	**>>>>**	**apply**
thinking		*digesting*		*planning*
concepts, models		*understanding*		*task*
theory		*conceptualisation*		*practice*

DISCOVERY LINE

experience	**>>>>**	**reflection**	**>>>>**	**realise**
observation		*description*		*insights*
case, exercise		*review*		*concepts*
life, work		*characterisation*		*patterns*

These can be seen as the two basic learning styles of action learning. There isn't a right or wrong style. For the facilitator it is important to include both learning styles in the design of a learning environment.

5. LEARNING DIALOGUE

Learning from experiences and the reception of feedback are indissoluble: Without feedback no learning dialogue, without learning dialogue no learning effect. Apart from various training methods and tools to enhance the quality of the learning effect, the quality of the feedback plays a crucial role. This is particularly so for knowledge not to be found in handbooks like handling specific situations, personal style and values.

The 'learner' has to start the dialogue in the first place. He expresses, in a self-chosen free form, some of his learning experiences. Only then the facilitator can start a supportive dialogue aimed at a better, clearer and a more distinct understanding of the experience *by the learner*. The facilitator does *not* add any new information nor is it necessary that the facilitator completely understands what the learner learns precisely. This approach is contrary to received student/teacher behaviour where the teacher starts questioning and "knows better".

Three types of sentences for a learning experience
Although rigid instructions about the format of the 'learning experience' are a hindrance, some suggestions are practical:

- Formulate the learning experience in **one** sentence.
- Start the sentence with 'I': "I have learned that ....."
- Try to be as specific as possible, albeit still quite vague in the real situation.

In practice most people, when formulating learning experiences for the first time, tend to use three types of expressions:

1. **An evaluative remark**:
   “I enjoyed the experience (or that part of it)”, “I felt tense or stimulated”, “I think it is important or boring”, etceteras.

2. **An objective description**
   An expression in the format of newly acquired knowledge or insights in comparison to the old ones.

3. **A direct jump to action**:
   “From now on I will no longer (re)act this way but that way.”

In many cases the beginning 'self-learner' will mix up these expressions. A mature 'self-learner' is able to reflect upon his experiences in such a way that he distinguishes these three expressions as aspects from the same core.

Task of the facilitator
It is now the task of the facilitator to support the learner clarifying his experience with a 'learning dialogue'. **Not** by adding new information but by asking carefully, patiently and quietly 'Socratic' questions like "what, how, why ...." about the trainee's experience.

Objective of the learning dialogue
The unskilled self-learner most often formulates experiences dominated by type (1) and/or (3) expressions. He also may get lost in lengthy reporting or limits his text to demonstrable knowledge or skills: "I know that Madrid is the capital of Spain." Type (2) expressions require reflection and support from another person. Back-reasoning from (3) by asking "How did I come to the idea for that action?” will be helpful. Also starting with the type (1) sentence the facilitator could ask: "What insight or conclusion lies underneath that feeling/judgement?" will lead to the more specific insights of type (2). In that way, the learning effect can be maximised. In a practical situation, the facilitator helps the learner to 'un-cluster' some of the written text, or, if it is completely oral, one or two aspects of it only. The learner is then put on the right track for improving his way of doing.

	PRACTICALITIES
Further reading	• "A Holographic Metaphor for Guiding Social Change." Morgan, G. and R. Ramirez, Human Relations, 1988. • "Learning in the perspective of responsibility." Lex Bos, NPI-bulletin, Zeist NL, 1988/12.
Miscell.	
Source	• Patrick Boel, with thanks to Gérard van Eyk for his work on developing the learning dialogue. May, 2006

Title

START OF TRAINING

Subtitle

SUMMARY

A good start lays the groundwork for a successful training or workshop. This two page note describes a number of topics to address and gives a basic programme for the start-up.

DESCRIPTION

Introduction

In most situations participants feel insecure and uncomfortable at the start of a training or workshop. They don't know each other, aren't sure if the programme will meet their expectations, have some practical questions and 'awaiting' what will come. For the trainer it is also a 'new' group, if s/he has prepared the 'right' programme and if everything will work out and functioning as planned.
Time spend on the start session is well spend and will have great benefits later on in the programme.

Objectives

Personal relationship

- To establish good relationships with the participants.
- To enable participants to begin to know the trainer and each other better.

Expectations

- To get a clear picture of expectations and apprehensions.
- To identify needs and learning blockages or barriers.
- To focus attention on the own learning.
- To formulate learning objectives on different levels.

Attitude

- To generate confidence and enthusiasm.
- To assess the level of motivation and morale.
- To create a learning attitude.

Training methodology and style

- To induct participants in action learning, team learning and interactive training.

Unfinished business

- To make an inventory of individual problems, which participants cannot *solve* while they are here, and which *detract* them from involvement and potential learning.

Training environment

- To induct participants into the training location and house rules

Outputs

A good learning and/or work environment for the actual training / work at hand.

Topics

Topics to address are: personal relationships, expectations, attitude, training methodology and style, unfinished business and training environment.

WHEN TO USE

Situation

At the start of any training or workshop.

Target group

Especially with people who are new to each other and to the topic or task

Time

In general 30 – 45 minutes.

PROCESS

Reception

- Welcome everybody personally, shake hands.
- Serve coffee/tea.

Programme

1. Welcome speech

- Welcome participants and other guests
- Introduce yourself and your colleagues

2. Introduction to each other

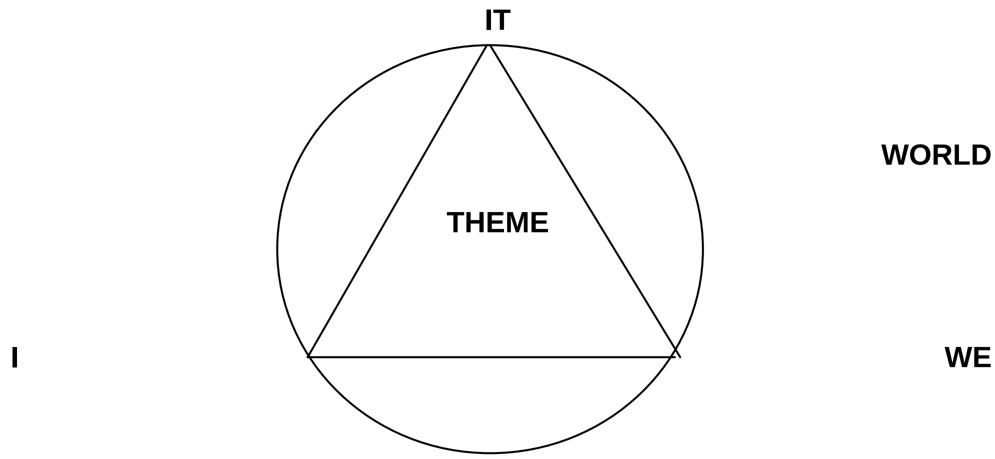
	• Use any convenient method (round, interview, etc.) **3. Presentation of the programme** • Objectives, outline • Levelling of expectations (use any convenient method). • Levels of learning: professional, personal, subject, methodology. • Explanation of the training methodology: action learning, team learning. • Attitude: self-responsibility (learning, feeling comfortable, community, being present) and beginners mind (open, receptive, go for the new, not to reinforce). **4. Distribute course materials** • Hand them personally • Give a binder, if appropriate, in which they can organise materials. • Have stapler and perforator available. **5. Confidentiality** • All revealed information will be held in strict confidence. • You will not report about individual participants. **6. Unfinished business** • Make yourself available for assistance. • Participants can list non-seminar thoughts on a 'thought page', which are sealed in an envelop and stored away. **7. Practicalities** • Name and identity of key staff of the training venue • Coffee / tea breaks • Facilities (restaurant, toilets, exits, telephone etc.) • House rules of the training venue • Rules in the training, such as wear name tags, be in time, mobile phones out and no smoking in training room. **8. First tasks (if appropriate)** • Preparation for next session • Evaluation team (evaluates the previous session/period) • Documentation team (collects extra copies of all materials) • Budget team (administers the budget, to be spend by participants)
Methods	• IRC-FN: Introduction round • IRC-FN: Levelling of expectations
Reflection	• 'How is everybody doing?' • 'Do you feel ready to start?'
Closure	
Tip	Always include some extra time (± 15 min.) in the planning of the start session for flexibility.
Tip	If the start session takes more then 45 minutes, then take a short break before starting the next session.
	PRACTICALITIES
Handouts	Programme of the training or workshop, if not they haven't received it with the invitation.
Materials	Paper, markers, post-its, cards.
Equipment	Flip chart, pin boards, beamer.)
Room	Comfortable setting
Further reading	• IRC-FN: Setting of the room
Source	Patrick Boel, June 2006

Title
THEME CENTERED INTERACTION
Subtitle
Dynamic balance between learning task and learning process.

SUMMARY

A paper about the concept of Theme Centred Interaction (TCI), to understand the dynamic balance between learning task, learning process, learner, group and context, and some basic rules.

In theme centred interaction (TCI)around the central **THEME** attention is paid to both the learning task **(IT**), as well as the learner self (**I**), the learning group (**WE**) and the environment (**WORLD**). Aim is to permanently find a balance between these elements. Schematically it looks like:



The two most important principals of TCI are:

1. Be your own leader

Everybody is responsible for his/her own learning process. Say what you want to say, but also don't say what you don't want to say (also give and take). Self management requires all the times conscious choices. Choices however are made regarding the other and contextual factors.

2. Interruptions have priority

All sorts of circumstances can interfere with a dynamic learning process (the weather, sadness, sleep, group members, the theme, problems on the job etc.). By paying attention at these interruptions TCI tries to make them productive for the learning process. The outcome of talking explicitly about an interruption is mostly, that afterwards you can continue with the theme.

Some rules:

1. Represent yourself in what you say. Say ***I*** and not *we* or *one*.
2. Be ***authentic*** and ***selective*** in your communication. Be aware of what you think and feel, and be selective in what you say and do ('selective authenticity').
3. Don't interpret and generalise. Tell instead your ***personal reactions***.
4. Pay attention to ***signals of your body*** and to similar signals of others. Talk about them.

	PRACTICALITIES
Further reading	• (Titles) • (Links to web sites)
Source	Patrick Boel June, 2006

Title	# TRANSACTIONAL ANALYSIS
Subtitle	***'Behaviour causes behaviour'***

SUMMARY

A one page description of the Transactional Analysis (TA) model with three sub-personalities: parent, adult and child. The model helps to analyse and understand the interpersonal behaviour.

Each personality can be analysed, using three sub-personalities: PARENT, ADULT and CHILD. Each sub-personality or ego-position is characterised by certain behaviour and matching statements. We go from one position to the other, depending how we feel or what we think. This theory is called 'Transactional Analysis' because it is in compliance with the communication law 'Behaviour causes behaviour'. Depending on your own ego-position you can react rather differently on a situation, or on the behaviour of others. By analysing your own and others behaviour, you can discover how to behave more in accordance with the ADULT-position.

PARENT position *Places him/herself above the other.* *Feels him/herself extremely responsible.*		
CP Critical Parent *Criticises, states borders, makes rules, sets norms.* ■ Watch out! ■ Behave! This is appropriate ■ Don't be childish!		**EP Educating Parent** *Cares, nurtures, protects, set also rules, helps.* ■ Come on, you can do it! ■ Don't be scared, I'm still there. ■ Let me show you..

ADULT position *Places him/herself in an equal position.* *Feels responsible for what he/she does.* *Creates free space for him/herself and others.*		
	A Adult *Reacts here and now, is solution oriented, organises, acts, informs.* ■ We have three hours for this job. ■ Can anybody tell me what is going on? ■ What do you think is the problem?	

CHILD position *Places him/herself in a dependant position.* *Doesn't feel responsible*		
AC Adapted Child *Reacts as expected by others, behaves correct and well, or just contrary, sometimes afraid for authority.* ■ Look, there he comes. Watch out! ■ No, I'm not allowed to do that. ■ I make sure not to draw any attention. ■ If I do my best, then they like me.		**FC Free Child** *Reacts spontaneously, is playful, shows emotions, is curious* ■ Shit, I don't like it. ■ You scare the hell out of me. ■ Shall we make a party? Nobody is paying any attention.

	PRACTICALITIES
Further reading	• (Titles) • (Links to web sites)
Source	Patrick Boel, with courtesy to Bert den Boer, BBdB (NL). June, 2006

Title	# DESIGN THE SETTING OF A ROOM
Subtitle	***The setting is a symbolic message.***

	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	An instruction with models and principles for designing the setting of a room and giving an indirect message about the intended work process.
	DESCRIPTION
Introduction	The setting of a room is an important aspect of the design of a session. Certain methodologies require a specific setting, the setting needs to be consistent with the objective and character of the session, and the whole atmosphere has a strong influence on the process during the session.
Objectives	To create the right environment for a session.
Output	The setting supports the outcome of the session.
Topics	An overview of different models and considerations for the design of a setting.
	WHEN TO USE
Situation	It is appropriate to pay attention to the setting of the room for all sorts of session, but especially in venues, which are mainly used for meetings, presentations and more traditional ways of training and teaching.
Target group	•
Time	Plan at least 30 minutes before a session for checking and (re-)arranging the room.
	STANDARD SETTINGS
	There are a number of standard settings, each with its own purpose

Settings

1. CLASS ROOM
A one-way flow of information from the expert to the audience.
Setting: Rows of chairs and tables for the participants. The ‘teacher’ in front with his own table, blackboard and screen for overhead or beamer.

2. U-FORM
A one-way flow of information from the expert to a group of maximum 20 participants, combined with questions and discussions.
Setting: Rectangular tables in a U-form for the participants. A table at the open end for the teacher/trainer, with flip chart, screen and/or white board
.

3. CARRE
An exchange of information. The facilitator moderates the group discussion.
Setting: Tables in a square setting (carre). The teacher sits at the long side (more central) or at the short side (the "head" of the table).

4. ROUND TABLE
All input is placed in the middle of the table and everybody ads or takes.
Setting: A large table (square or round) without a "hole" in the middle! Use a sheet of paper in the middle of the table to write things down.

5. HELICOPTER VIEW
Getting an overview. Not having to "look up", as with a flip chart or screen.
Setting: Place chairs in a circle. Use a low table with sheets to write on, or use the floor.

6. CIRCLE
Open communication, making your self visible, using language and body language.
Setting: Chairs in a circle, no tables.

7. FORUM
Experts answering questions from the audience.
Setting: Table in front for the experts, the chairman in the middle or aside. Rows of chairs and tables, or tables with chairs around.

8. CAFE
Informal setting for larger audiences with the possibility of conversation in smaller groups.
Setting: Preferably round tables (4 – 8 persons) spread over the room. The speaker at the widest side of the room on a small podium.

9. METAPLAN
The metaplan method is a highly visible brainstorm and discussion technique. It forces people to work 'on the wall' and not in their notebooks.
Setting: See the annex for a variety of settings.

VARIATIONS

Be creative in finding the right location and setting. Some variations:

Variations

1. Garden / Park
Being outside in fresh air and surrounded by nature has a relaxing influence. Sit in the garden or go to a park. Find yourself a nice spot.
2. Museum
There are very nice places in museums, especially for working in small groups. It can be a very inspiring environment and it offers many opportunities for relaxation and recreation.
3. Learning by walking around
Talk in small groups when walking. The environment can be inspiring, walking makes it easier to be silent now and then,
4. Lazy chairs
Sitting comfortable in lazy chairs relaxes the mind and makes people listening in a different way.

CONSIDERATIONS WHEN DESIGNING A SETTING

Designing a setting start with carefully examining what will happen during the session. The setting should be supportive. The unconscious message of the setting should be taken into consideration.

Considerations

1. Level
Information can be presented on different levels in comparison of the level of the participants. This level and the position of the speaker / facilitator should be consistent with the kind of intended exchange.
<u>Higher level</u>
When using power point, flip charts, overhead and white/blackboard the participants have to look up. The information is presented on a higher, hierarchical level
<u>Equal level</u>
When writing on sheets on the table, the information is on the same level with the participants. It's easier to play with what is ‘laying on the table’, to add and take.

<u>Lower level</u>
When using a lower table or the floor, the participants are in a higher position. They can look at it from a helicopter point of view.

2. Hole
A table with a 'hole' in the middle (for instance the commonly used carre setting) makes it difficult to put something 'in the middle'. It falls on the floor and gets lost, or it is placed directly in front of someone, on his 'plate'. S/he, in reaction, pushes it on someone else's plate. Or the group needs a lot of energy to imagine that it is still there in the middle.

3. Object
Using objects or writing things down enables the facilitator to give the information a 'location'. It can be 'parked aside', or brought back in the 'centre of the conversation'. The setting is now instrumental in the way the memory works.

4. Process
When 'going through some process', this would be more expressive if the room allows to literally move with the group, by choosing different settings and places for each step in the process.

5. Participation
In a circle, instead of a rectangular setting, participants can have eye contact with all the other participants.

6. Sub groups
Participants need to be able to see all relevant materials, see each other, converse with each other without raising their voices.
The trainer/facilitator should have a clear access lane to every group.

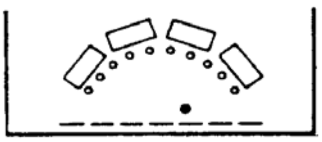
7. Atmosphere
Create a nice, comfortable and stimulating atmosphere that fits to the learning process. Pay attention to the light, flowers, music, food/beverages, temperature, furniture, room.
Create freedom by avoiding 'FREEDOM': **F**reezing, **R**oasting, **E**ar strain, **E**yestrain, **D**istraction, **O**verworking, **M**essiness.

	PRACTICALITIES
Handouts	FN: Metaplan
Further reading	
Miscell.	
Source	Patrick Boel May, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• Especially in venues, which are mainly used for meetings, presentations and more traditional ways of training and teaching, it is absolutely necessary to check the room well in advance and make the necessary arrangements for the setting. • Plan sufficient time before the session to check the arrangements and to (re-)arrange the room.

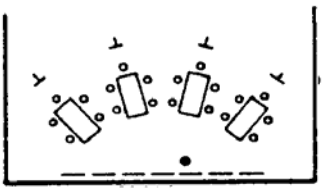
ANNEX METAPLAN SETTINGS

Various settings for working with the metaplan method, a highly visible brainstorm and discussion technique.

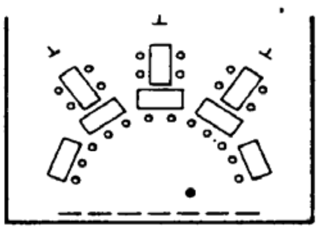
1. Standard
Large wall to stick on sheets of paper. Half circle with chairs, with the open side to the wall.



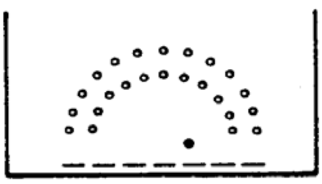
2. Standard + tables
Tables behind the chairs, for papers, coffee, etc.



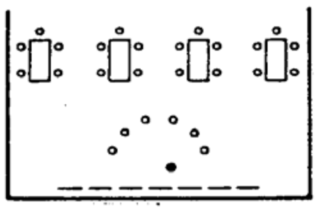
3. Standard + buzz group
4 tables. 4 chairs/table. Each table a flip chart. Useful to combine metaplan with short buzz group sessions.



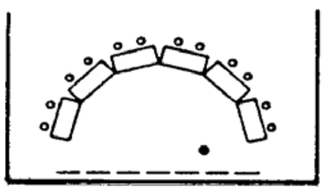
4. Standard + subgroups
At the outside of the circle some extra tables where people can sit when they work in subgroups.



5. Double standard
The second row of chairs for observers. They can change place with people in the front row or use an empty chair.



6. Standard + experts
Some people in the standard setting. In the back a row of tables for small groups of experts, who do not directly participate.



7. Passive
The standard with table at the inside. People stay on their chairs and the moderator sticks/writes on the wall.

FLIP CHART

HOW TO USE

The flip chart can be used by the trainer during a trainer session to illustrate key points. The trainer can prepare the flip chart at forehand, eventually with notes for him/herself as well in pencil.
Alternatively the trainer can write on the flip chart, during the session. To keep straight paper with reprinted lines or some pencil lines might be helpful. During the session extra information can also be added to the (prepared) chart by using post-its.

Don't talk when writing.

The flip chart is suitable for small to medium size groups. It can be used for both informal presentation/training situations and also can be used effectively for formal presentation if the lettering on the flip chart paper is of a high professional standard.

LAY-OUT

- The lettering must be 4 cm high minimum.
- Use markers of different size and colour, to highlight. Be aware that lettering, written with the 'normal' size marker, is not very well legible.
- Try and keep to 8 lines per page.
- Write key words only.
- Use arrows or stars to indicate points if you wish.
- Black and blue are recommended for lettering with either red or green for headings, lines and symbols.
- Experiment!

PAPER

- The common size of flip chart paper is about 70 x 100 cm. They are sold as flip charts pads with 50 sheets; blank, with lines or squares.
- When using markers of different sizes and colours a size of 80 x 120 cm (known as paper format A0) is more suitable.
- Use a paper quality of at least 100grs/m2, which is thicker and stronger then normal paper.

STAND

The flip chart stand is an easy type stand to which flip chart pads can be attached, usually by a screw or clip mechanism at the top. The stands come in a variety of sizes. They are designed for portability with handles and legs which will fold up for easy transport.

WORK SHEETS

If you use prepared flip charts (or overhead slides), then you can easily make 'hand-outs' in Power Point (Microsoft software) to hand out to the participants. Leave enough open space on the hand-outs to make notes.

Title
USING POWER POINT

Subtitle
A check list for a 'power point' presentation

SUMMARY

A short instruction for designing and giving a power point presentation. Most of it also applies to an overhead presentation as well.

DESCRIPTION

Introduction

A 'power point' presentation is named after the commonly used Power Point software from Microsoft.
The power point software allows for presentations ranging from simple sheets with some text to sophisticated sheets with logos, pictures, colourful lay-outs and video fragments.
It can be a powerful tool for a presentation, but it should be used carefully and consistent with the objective of the presentation, the audience and the overall context.

Objectives

To support an oral presentation with visuals. 'An image could say more then 1000 words.'

Output

The combination of listening and seeing leads to a better understanding and remembering by the audience

WHEN TO USE

Situation

In combination with a structured, linear, one-way type of presentation, such as a lecture, a speech or a promotional talk.
It is not appropriate for a more associative, interactive type of presentation.

Target group

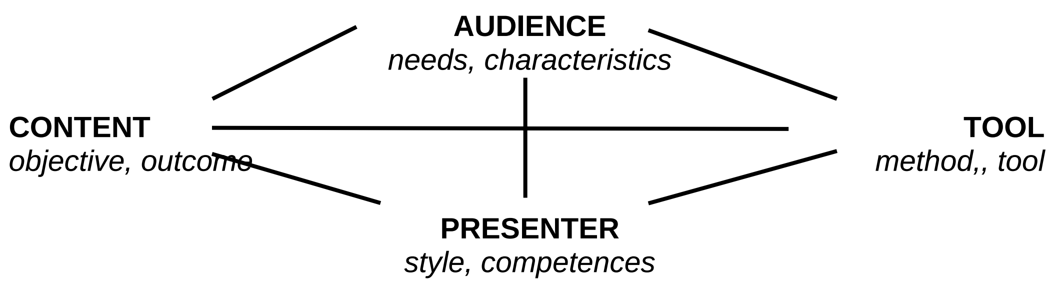
Any size of audience

DESIGN OF THE PRESENTATION

Principle

The design of a presentation is a match between:
- interest/needs of the **audience** and their characteristics
- **content** of the presentation in terms of objective, subject and outcome
- presentation method and **tool**
- style and competences of the **presenter**

Schematically:



Designing the presentation is an iterative process.

Step 1

Analysis of the audience and setting
- Present level of knowledge about the subject of the presentation?
- Interests, expectations?
- Other relevant characteristics (age, gender, culture, experience)?
- Size of the audience?
- Available time?
- Room (size, setting, windows, curtains, atmosphere, light, location)

Step 2

Setting presentation objectives
- Objective and results/outcomes.

	• Criteria for verification if objectives are met.
Step 3	**Development of presentation content** • Development of content • Breakdown of content in slides (max. 15, max. 5 minutes/slide) • Overview of presentation at the beginning with objective and outcome • Summary and conclusion at the end
Step 4	**Pacing** • Breakdown of presentation in time (max. 20 min. without interruption) • Enough time for clarification/explanation of the slides • Enough time for questions and discussion.
Tip	'Remember: Less is more!'
	POWER POINT SLIDES
Content	• Key points only, as simple as possible • Clear text, to the point • Avoid too much statistics and figures.
Lay-out	• Six words per line and six lines per slide. • Lettering at least 24pt in size. • Make the slides attractive, using colour, pictures, drawings, symbols, but not too much.
	PREPARATION
In advance	• Rehearse your presentation • Check the availability of equipment and technical assistance • Make sure that the appropriate software is installed on the computer. • Make a checklist what to bring for the presentation: laptop, beamer, cables, extension cable, documentation, hand-outs, etc. • Be prepared in case the equipment isn't functioning
In the room	• (Re-)arrange the setting of the room • Check the visibility of the screen from all parts of the room. • Ensure the computer and beamer are working properly. • If necessary, give instructions to the operator of the computer
	DELIVERING THE PRESENTATION
Tips	• Don't read each key point to the audience. • Maintain eye contact with the audience. Don't look at the screen. • Involve the audience • Show self-confidence • Switch the beamer OFF when not in use. • If appropriate, switch OFF while you are browsing. • Be conscious about the time.
	PRACTICALITIES
Handouts	It can be helpful to print the slides in hand-out format, for instance three slides per page.
Equipment	Screen, computer, beamer, pointer, table / standard
Further reading	
Tip	Be well in advance in the room to check the equipment ('Law of Murphy').
Source	Patrick Boel, with thanks to Felicité, Adeel, Kingsley and Dony. June 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	•

Title	# BE USEFUL
Subtitle	***Supportive thinking instead of negative criticism***

	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	A quick method (15 – 30 min) for supportive thinking instead of negative criticism for (sub)groups of 4–6 persons.
	DESCRIPTION
Introduction	'99:1 rule: It is easy to give the 99 reasons, why an idea isn't gone work. But especially with new ideas it helps to offer the one reason why it could work. ' This method helps to get support from others in a very efficient, structured way. It also prevents that others feel obliged to further participate or to take responsibility.
Objectives	To practice supportive thinking, so participants can be useful for someone with a question / problem in a quick, easy and free way.
Output	• Suggestions, leads, options, inspiration. • Experience with the methodology
Topics	Any question or issue that puzzles / bothers someone in the group.
	WHEN TO USE
Situation	• When the facilitator thinks that someone needs some input from others, without taking too much of their time. • When the facilitator/trainer wants to make participants familiar with the method, which they can use in their work situation.
Target group	Whoever are there, are the right people; in (sub)groups of 4-6 persons.
Time	15 – 30 minutes for the method itself, but 30 – 45 minutes including introduction and reflection.
	PROCESS
Introduction	Introduce the method if participants aren't familiar yet with it.
Instruction	• Form small groups of 4 – 6 people. • Ask which participant (X) has a question / problem and would like to get some input from the others. • Appoint someone of the (sub)group to look after time and procedure during the assignment. • Make sure that everyone understands the procedure.
Procedure	**5 min. Presentation** • Explanation of the question / problem / issue by X. To the point. • Express expectations about the contributions of the others. • The others only listen! **5 min. Questions** • *Informative* questions only. **10 min. Supportive thinking** • Be useful • Advises / tips / suggestions. Information • Write 'supportive thoughts' on post-its and as a 'gift'. • X only listens! The others talk about the issue of X. **10 min. Dialogue** • To deepen the understanding of the supportive thoughts. • 'Socratic' questions: what, why, when, how, where. • Dialogue instead of discussion! • Generalise. What do the outcomes mean for the others.
Reflection	• How did you experience the procedure?

	• Have you been successful in supportive thinking? • Have the expectations of X been fulfilled? • What useful things did the others pick out of it for themselves ?
Closure	• The pacing was such that there was enough time to practice the method. In reality it can be dome much faster. • The more specific the question, the better the input from the others. • You don't need all the information to be useful. • The procedure forces X to listen and it prevents direct reactions. such as 'yes, but …' , 'I tried that already ' and 'no,,,,,'. • It is good behaviour, if X thanks the others for their input and inform them later about the follow-up. However, it is the sole responsibility of X, how s/he will use the input ('No strings attached!').
	PRACTICALITIES
Handouts	Participants can receive this facilitator note afterwards.
Materials	It helps to have the procedure with the timing on a chart, when giving the instructions.
Equipment	
Room	
Further reading	IRC-FN: Asking questions
Miscell.	
Source	Patrick Boel June, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	•

BRAINSTORM

The main objective of a brainstorming session is to come up with as many ideas about a topic as possible in a given space of time.

GENERAL RULES

Brainstorming is an opportunity to give free rein to the imagination. There are no rights or wrongs and no judgement is placed on any comments.

- *Don't judge or criticise* any ideas, this can come later.
- Let ideas flow, *be imaginative*, even if they are crazy.
- Free wheel, build on other peoples ideas.
- Go for *quantity* not for quality.
- Clarify items. Expand on a idea without evaluating it.
- Record *all* ideas, no matter how trivial it might seem.
- Once everything have been listed, asses and evaluate them.

Title	# BUZZ GROUP
Subtitle	***Everybody gets involved***

	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	To activate a group/audience (any size). Buzz groups are made up of 2-4 people who work together for a short time (5-10 min.) to discus a topic or do a little assignment.
	DESCRIPTION
Introduction	Buzz groups are made up of two to four people who work together for a short time to complete a task, to discuss a topic or to solve a problem. Buzz groups get their name from two characteristics of their activity: 1. There is generally quite a noisy buzz in the room. 2. Working in this way sets ideas buzzing in the group and in people's mind.
Objectives	Some reasons to use buzz groups: • It helps to maintain interest and to get people involved. • It stimulates their learning by discussing and expressing their thoughts. • It offers information and experiences to further build on during the lecture or training session. • It helps participants to get acquainted with each other.
Output	• An energised, involved group / audience. • Interactive input for the programme.
Topics	
	WHEN TO USE
Situation	Especially in larger groups where some interaction and participation is needed.
Target group	Any size of group
Time	5 – 10 min.
	PROCESS
Procedure	• Form buzz groups of two to four people by asking everybody to turn to their neighbours, without moving from where they are sitting. • Give them a simple task or question, which takes from 5 to 10 minutes (maximum). • After completing their task ask some people to report or express experiences.
Closure	Use the outcomes as starting point for the rest of the programme.
	PRACTICALITIES
Handouts	•
Materials	•
Equipment	•
Room	•
Source	Patrick Boel May, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• It is a simple way to 'neutralise' people, who dominate the discussion in plenary sessions. • Using buzz groups in the beginning of a session helps to create an informal atmosphere.

Title

CARROUSEL

Subtitle

'Speed Q&A'

SUMMARY

The 'carrousel' is a method to provide information / advice simultaneously by different resource persons to a large, heterogeneous group with a wide variety of questions. It combines in an interactive way attention to individual questions, engagement of several resource persons and sharing of answers / outcomes to a wider audience. It takes about 90 minutes.

DESCRIPTION

Introduction

A plenary 'question and answer' (Q&A) in a large, heterogeneous group by a panel of resource persons tends to get chaotic and frustrating. People don't get sufficient individual attention for their question, there isn't enough room for everybody to ask a question and resource persons can only make a limited contribution. The 'carrousel' combines individual answering of questions by several resource persons, with a sharing of answers / outcomes to other participants. Each participant gets the opportunity to ask her/his question to satisfy her/his need for information.

Objectives

- To give sufficient attention to individual questions
- To recognise patterns in the need for information
- To provide efficiently information by a number of resource persons
- To share answers / outcomes with others in the group in a more interactive way.

Output

- Participants feel more satisfied with the received information, because it is more geared to their individual needs.
- Impression of the information needs of the group.

Topics

WHEN TO USE

Situation

- When there is a wide variety of questions about a topic and when it is difficult to assess at fore hand what the information need is.
- When several resource persons are available for answering questions and/or giving advice.
- A carrousel is inappropriate when participants expect more then receiving information / advice.

Target group

- A large (> 20), heterogeneous group with a wide variety of questions.
- About one resource person / 5 people to answer individual questions.

Time

The carrousel itself takes about 45 minutes, with a plenary recapitulation of about 30 minutes.

PRINCIPLE

Procedure

- The resource persons are seated at different tables with about 6 chairs, spread over the room.
- Everybody gets the opportunity to ask one question. Once you have asked your question, you can only listen or wait if there is time for an extra question at the end of the carrousel.
- There is a strict maximum of time per question.
- A participant can ask additional clarification until her/his time is up.
- Participants can freely choose which resource person to address.
- Participants can move around freely from one table to another to listen, but they are not allowed to interfere, unless specifically asked by the resource person.
- Only questioning, no discussion! The objective is to satisfy your individual information needs.

Be aware

- 'Vague in, vague out.' The more precise your question, the more precise the answer.

	• 'Your question is my question.' Sometimes it is sufficient to listen to what others are asking, to get the information you need. • 'Play the joker.' Don't go for the obvious, but use an unknown resource person to get new information / perspectives. • 'Air time': The more you talk , the less time there is for the resource person to answer.
	GENERAL PROCEDURE
Introduction (5 minutes)	• Explanation of the objective and procedure of the carrousel, and introduction of the resource persons, who will answer the questions / give advice. • The resource persons seat themselves at different tables, spread over the room.
Carrousel (45 minutes)	• Carrousel in cycles of 5 - 10 minutes. Set a strict maximum. • Use any convenient method (see below) to ensure equal opportunity for participants to ask a question. • Use any convenient method to announce the next cycle of questions and/or make sure that the resource persons pay attention to the time. • Resource persons take notes to be able to share some of the outcomes, which are of general interest, in the plenary session.
Break (5 minutes)	• Short break to enable the resource persons to quickly share some impressions and organise the sharing of outcomes. • Rearrange the room for the plenary
Plenary (15 minutes)	• Each key person shares some of the outcomes, which might be of interest for the whole group. • Drawing some conclusions.
Reflection	• 'To what extend are your questions answered?' • 'What more information do you need?'
Closure	• Encourage people to continue their questioning of the resource persons after the session. • Remind the group that the objective of the carrousel was to satisfy **individual** information needs.
	Q & A CARROUSEL
Objective	• To provide information about a topic by answering questions.
Procedure	• All participants get a blank card to write down their question. In this way everybody gets the opportunity for one question and the questions can be used afterwards to analyse the information need of the group. • Participants can write their question at any moment during the carrousel, taking into account what they have already heard. • They are free to give their card to someone else, if they don't feel the need to ask a question or want to give someone else the opportunity to continue. • Per person is a maximum of 5 minutes for questioning the resource person. • The resource person can have some blank cards to enable additional questions if there is time left at the end of the carrousel.
Tip	• Have some reserve time in the carrousel to allow for additional questions.
Tip	• Instruct the resource persons at fore hand about their role and the procedure.
Tip	• Ensure that participants understand the principle of the carrousel: five minutes/person, free moving around.
Variant	• Let everybody stand at high tables to stimulate a more active behaviour.
Variant	• Use playing cards or any convenient / funny object if recording of the questions isn't needed.
	ADVISORY CARROUSEL
Objective	• To provide individual advice
Procedure	• Make a time schedule on a chart with cycles and resource persons.

	• Per question / person is a maximum of 15 minutes. • Participants can make an 'appointment' by writing their name on the time schedule.
	PRACTICALITIES
Materials	• Cards for questions (at least1/person), markers, clock / sand-glass
Room	• Enough space for the setting of the carrousel with a table per resource person. Tables should be sufficiently apart.
Source	Patrick Boel, with courtesy to Alexander van der Eijnde (Ideeprodukt, NL), June 2006.
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	•

DIALOGUE

Kyakanteki (Japanese): the guest's point of view.

DISCUSSION

Exchange of opinions and arguments to *convince* the other of one's own point of view.

DEBATE

A more structured, formal form of discussion where the one with the best argument *wins*.

DIALOGUE

Exchange of opinions, knowledge and experiences to *enrich* the participants.
Basic conditions

- Suspend assumptions
- Seeing each other as colleagues
- Facilitator

TIPS

- No "yes, but ......?
- Use "I", try to avoid "you", "one" or "it".
- "I want" instead of "you must".
- "I give you my view on your question/problem."
- "My approach would be ....."
- No objections, but "How can we overcome this problem?"

Title	# DISCUSSION
Subtitle	

SUMMARY

Instruction for preparing and chairing a discussion, an extremely common type of instructional strategy and especially useful for exploring issues, solving problems and making decisions.

DESCRIPTION

Introduction

Discussion is an extremely common type of instructional strategy and especially useful for exploring issues, solving problems and making decisions. The discussion method is also one of the major ways to get a group to explore personal attitudes. By means of discussion and the careful examination of assumptions, some change in personal attitudes can result.

Objectives

- To explore issues and personal attitudes
- To solve problems and make decisions

WHEN TO USE

Situation

The tendency in a discussion is to convince the other of one's own point of view. Don't use a discussion, but for instance a dialogue or brain storm, when a less confronting, informative contribution is more appropriate

PROCESS

Preparation

In the preparation of the discussion a number of issues has to be addressed :

1. Objective

"What is the reason for the discussion? What outcome do you want?"

As the discussion leader you have to ensure that the discussion stays focussed on the objective.

2. Subject

"What is the discussion about?"

The discussion is about an issue or question, to be clearly stated at the beginning. Participants need to have enough information. Eventually that requires some extra time to read documentation or prepare them selves.

Be prepared to have some challenging questions or statements at hand to refuel the discussion or to start a new topic.

Imagine how the discussion might proceed, what possible arguments participants might have and where your contribution might be needed to keep on track.

Think about "What, if ...." : They all agree / there is no reaction / they don't understand / etc.

3. Programme/time schedule

"What is a good timing for the different stages in the discussion?"

Each discussion starts with an introduction of the objective and the subject. Then there is the discussion it selves. At the end there need to be enough time for conclusion. In case the discussion has to be reported to others, some time is necessary to prepare the presentation of the outcomes.

4. Reporting

"Who is making notes?"

It has to be decided whether or not the outcomes have to be reported. If yes, then someone has to make notes. During the discussion you might write some key words

	on a flip chart. The person, who will do the presentation, might best be appointed at the start, so he/she can make also notes for him/herself. **5. Setting** *"Where will the discussion take place?"* Depending on the number of participants and the type of discussion, you have to prepare a room and a setting. It can be a round table, or just a circle without a table, or ....
Discussion	• Start the discussion with your introduction and some opening question or statement. Don't forget to mention how much time there is, and to organise the reporting. • If there is no spontaneously reaction, direct your question to a participant. Ask others for their opinion. • The atmosphere of the group is important, it should be relaxed, yet planned and organised. Make sure that there is a free flow of arguments and debate. Encourage people who are silence and stop people who are talking too much. • Your role as discussion leader is to facilitate the discussion, and not to participate. This is especially difficult when you disagree, or when you would like to add some information. Give questions back to the group. • The argument must be refuelled by posing challenging questions, whenever it appears to be running out of steam or losing direction. • The discussion must also be brought to a conclusion and should not be allowed to peter out. This is best done by summarising the major points.
Reporting	What will be reported and how depends of the objective. Sometimes each group gives a summary. Or they report only key points which might be of interest to others. Or it might be questions, to be answered by a forum. As facilitator you can compare outcomes and draw general conclusions.
Methods	• IRC-FN: Visual talking • IRC-FN: Setting of the room • IRC-FN: Subgroups • IRC-FN: Asking questions
Tip	Some feedback to participants for constructive behaviour: • No "yes, but ......? • Use "I", try to avoid "you", "one" or "it". • "I want" instead of "you must". • "I give you my view on your question/problem." • "My approach would be ....." • No objections, but "How can we overcome this problem?"
Tip	To improve discussion skills some participants can take the role of observer or chairing the discussion.
	PRACTICALITIES
Materials	• Markers, post-its, cards (if appropriate)
Equipment	• Flip chart, pin boards (if appropriate)
Source	Patrick Boel June, 2006

Title	**DOING A ROUND**
Subtitle	

	SUMMARY
	When doing a round, everybody gets successively a turn to make a contribution. There are different ways to structure a round.
	DESCRIPTION
Introduction	At some point in a plenary session it can be appropriate to get a contribution from everybody in the group. This can be done by doing a round to systemise the conversation and to make the reporting easier to do. The way to do a round depends on the situation, the group, the available time and the intended outcome.
Objectives	To get a contribution from everybody in the group.
Topics	
	WHEN TO USE
Situation	When a contribution is needed / expected from all participants to start and/or conclude a conversation / session.
Time	It takes about 3 – 5 minutes per person, unless there are some restrictions given, like 2 minutes or 3 sentences.
	GENERAL PROCEDURE
Introduction	Explain the group what input is expected, in what order the round will be done and what restrictions there are.
Round	Conduct the round
Reflection	If appropriate ask some participants to reflect on the outcomes
Closure	Refer in a closing remark to the objective, the topics and the outcomes, and link them to the overall programme of the session.
	CONTENT OF CONTRIBUTION
	Open • 'You say what you want to say. ' <u>Considerations</u>: Requires self-discipline from the participants to focus.
	Specific topic / question • 'Introduce yourself.' • 'What is your opinion about …? ' • 'How would you do …?' <u>Considerations</u>: Creates focus.
	Learning dialogue • 'What have you learned?' <u>Considerations</u>: Reflection as part of the action learning.
	ORDRE
	Circle • Let the first person to the left or the right of you start, and then following the circle. • Or pick a specific participant to start. <u>Considerations</u>: It's simple. However, sometimes someone isn't ready yet to say something. Or participants concentrate themselves more on thinking about their own contribution instead of really listening to the others.
	'Who wants to start starts'

	• Someone, who is ready, says what he/she wants to say. Considerations: The participant has to say something only, when he/she is ready. However, very often it will be always the same one who starts or who waits until the end. A certain 'hierarchical order' develops after a while.
	Pass the turn on. • Someone starts and passes the turn on to someone else. Considerations: More surprise. The one, who has said something, switches his/her attention back to the group, when choosing the next one to contribute. It breaks the 'hierarchical order'.
	Counsel • An object is given around. As long as you have it, you have the floor. You decide for yourself when you are ready, and then you pass it on to the next person. Considerations: It's like a ritual. It helps to concentrate, both for the speaker as for the audience.
	RESTRICTIONS
	Limited time • For instance two sentences or 1 minute Considerations: Stimulates/develops the skill to talk 'to-the-point'.
	Fixed time • Each participant gets for instance three minutes. It is up to him/her to use all the time to say something, or be silent for a while. Consideration : Everybody gets the same amount of attention. Silence allows for thinking.
	Informative Question • Instruct whether or not *informative* questions from others are allowed. Considerations: It might enhance the understanding of the group. Make sure that the allowed time is not surpassed.
	Discussion • Instruct whether or not discussion is allowed. Considerations: By not allowing reactions / discussion participants are forced to listen, and they will have things to talk about during breaks. After the round some time can be allowed for reactions, depending on the objective of the round.
	PRACTICALITIES
Further reading	• IRC-FN: Facilitation of learning
Source	Patrick Boel June, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	

EVALUATION

Various forms for the evaluation of courses / sessions by participants.

FORM 1: COURSE EVALUATION

Course name:
Place, date:

Session	Subject	R	L	M	D	P	T
1.1							
1.2							
2.1							
2.2							
3.1							

Score	R relevance	L level	D duration	M materials	P presentation	T translation
+1	Relevant	Too difficult	Too long	Good	Good	Good
0	Somewhat relevant	Reasonable	Enough	Reasonable	Reasonable	Reasonable
-1	Irrelevant	Too easy	Too short	Not good	Not good	Not good

Thank you for your co-operation.

FORM 2: COURSE EVALUATION

GENERAL

- Did the course meet the objectives set? yes/no
- Did the course meet with your overall expectation? yes/no
- Which objectives where not met?

- What part of the course did you find particularly useful?

- Which part or parts did you find least useful?

- What changes to the course would you make?

- Were there any topics which were not covered and which you like to see included?

- What will you do differently as a result of attending this course?

SPECIFIC

Please give a mark for each session of the course on a scale of 1 - 5 by placing a cross in the corresponding column.

Session	Subject	1	2	3	4	5
1.						
2.						
3.						
4.						
5.						

1 = fully met expectations. Very useful
5 = did not meet expectations. Not very useful.

Thank you for your co-operation.

With courtesy to Don Bruce (UK), 2000

FORM 3: COURSE EVALUATION

Please write your remarks in the corresponding boxes?

	Content / Issues	**Methodology / Program**	**Atmosphere / Environment**	**Trainer**
What did you like well?				
What didn't you like that much?				
What improvements do you suggest?				

with courtesy to Geert Balzer (DE), 1998

FORM 4: SESSION EVALUATION

Course name:
Place, date:

OBJECTIVES

To review and reinforce the learning from the day's session for the trainee.
To provide the trainer with early feedback on the progress made each day.

	QUESTION	**ANSWER**
1.	How *valuable* was today's session for you? (circle the right number)	1 2 3 4 5 very valuable not so valuable
2.	What are the three most important things you *learned* today?	
3.	How do you intend to *apply* those ideas?	
4.	What are the *forces* that will encourage (and discourage) you from applying the best ideas?	
5.	What *techniques* or *methods*, used today, contributed most to your learning experience?	

with courtesy to Ben Kramer (NL), 1997

FORM 5: PEARLS & TIPS

Course name:
Place, date:

- Take a big chart and write in the upper left corner ‘Pearls’ and in the bottom right corner ‘Tips’.
- Give participants markets and post-its or cards and let them write down Pearls and Tips for 10 minutes.
- Ask clarification
- Let participants share some of their cards and or general observations.

Pearls are outcomes, which you especially find valuable and or things which you especially appreciate.
Tips are suggestions for improvement (constructive feedback)

PEARLS   **TIPS**

with courtesy to Andreas Grünewald (DE), 1994

FORM 6: EVALUATION

Reflection on a period / event / project / activity.

- Make a big chart as the example below.
- Let participants ask themselves these four questions:
  ‘What do you want to be the same / less / more / differently next time?’
- Let them write it down in key words in a way that we all understand **what** it is that he/she wants. Be as specific as possible.
- Ask clarifications: ‘What do you mean? Who has a similar reflection? What strikes us in these reflections?

the same?	**more?**
less?	**differently?**

with courtesy to Pete Woods (UK), 1999

Title
GESTALT

Subtitle
The 'Gestalt', as a whole, determines how to understand the different parts.

SUMMARY

A method to help participants better understand their own personality or their own perception of more abstracts subject or issues, by using elements of the Gestalt-theory. It requires a safe group environment and takes about 60 – 75 min.

DESCRIPTION

Introduction

A large description in many words very often doesn’t help to reach a deeper understanding of the meaning of something. By making a ‘Gestalt’ both the rational and emotional sides of the brain are used to get to the essence. Using words makes it easier to identify different characteristics of the parts and the 'Gestalt' creates an image of the whole.
The ‘personality gestalt’ is meant to get a better understanding of the own personality. With the ‘subject gestalt’ the meaning or perception of a more abstract subject or issue can be explored.

Output

- A better understanding of the own personality.
- A good perception and better understanding of the meaning of a more abstract subject or issue.

Topics

- Characteristics of the own personality
- A more abstract subject or issue (for instance work, family, networking, peace and integrity).

WHEN TO USE

Situation

- When participants feel the need for a deeper, personal understanding, for instance to define the direction of the own professional development.
- When there is the need to further explore the meaning or perception, especially of more abstract subjects or issues.

Target group

- It requires enough trust and safety in the group and a willingness to share more personal views and thoughts.
- It can be done with a group of any size.

Time

- At least 60 minutes, but with a ‘personality gestalt’ generally more to have enough time for conversation and reflection.

GENERAL PROCEDURE

Introduction

- Explain the objective and procedure of the assignment.
- Make sure that everybody feels comfortable to participate.

Step 1

Characteristic (5-10 min.)

- Take 5 – 8 small cards
- Think of .... (see instructions below for personality or subject gestalt)
- Write down spontaneously - so without too much 'thinking' - the characteristics on cards. A characteristic that strikes or struck you.
- Try to formulate five characteristics at least but don't make it more than eight. However, don't bother if the number annoys you.
- Use one card per characteristic.
- Be careful to choose simple words for these characteristics; not lengthy descriptions.

Step 2

Antonym (5-10 min.)

- Formulate the antonym of each of these words. This may help you to clarify what you want to express.
- Avoid 'non ....' or 'un.......' or '....less', like
  open <-> *~~not open~~*, but *closed* or *defensive* or *arrogant* or .....

friendly <-> ~~*unfriendly*~~, but *hard* or *rude* or *ignoring* or *....*
power <-> ~~*powerless*~~, but *weak* or *soft* or *afraid* or *low* or *.....*

- Express what it is, not what it is not.
- Make sure that everybody understands the meaning of ‘antonym’ before they start writing.
- People can help each other during this part of the assignment by giving examples of antonyms

Step 3

Gestalt (5 min.)

- Take the A3 sheet of paper.
- It's not important whether you continue with the original characteristic or the antonym on the backside. In case of the personality gestalt also the reference person doesn't matter anymore.
- Look with ‘half eyes’ to what you have written on the cards.
- Take the cards and arrange them in a pattern on the paper in such a way that the resulting figure makes sense to you. Use the whole sheet.
- Don't 'think' too much but keep (re)arranging until it feels good. Your hand already knows where to put the cards.
- It’s not meant to be a nice graphic design. It’s about positioning the characteristics.

Step 4

Explanation (20 - 30 min.)

- Form couples or triads, with someone you would like to talk with about your Gestalt.
- Explain your Gestalt.
- The others ask questions to help you clarify and better understand.
- Think also about the blank spaces between cards.
- Exchange experiences.
- You can also turn around your cards and see what comes out.
- Take 10 min. / person

Reflection

When sitting together again with the whole group, share experiences:

- ‘Does somebody want to say something?’
- ‘Anything remarkable that strikes you?’
- ‘Differences?’
- ‘How was the exercise going? How did it work for you?’
- ‘Do you like this method?’
- ‘Do you see any other possible applications?’

Tip

Make yourself available to assist in finding antonyms, if you see that someone is struggling. Let the group help you to show how they can help each other.

Tip

Show the group in step 3 how the arranging of the cards is done with some blank cards.

PERSONALITY GESTALT

Introduction

"What you see in others, says a lot about yourself." This exercise uses the characteristics of other people, to mirror your own personality.

Step 1

Think of the characteristic of these persons:

- Father.
- Mother.
- A friend of the same gender.
- A friend of the other gender.
- A 'good' teacher from the past.

	• A 'bad' teacher from the past. • A role model/reference person
	SUBJECT GESTALT
Procedure	It is difficult to have a precise understanding of the own perception of the meaning of a more abstract subject or issue, as for instance work, family, networking, and integrity. By using a combination of different characteristics the 'Gestalt' helps to understand what for each individually is the essence of the subject or issue.
Step 1	• Think of the subject or issue at hand and write down the characteristics which come to your mind.
	PRACTICALITIES
Handouts	• (List of hand-outs, which are used in this session, with a reference to the location, where they can be found. Hand-outs can be (additional) information about a topic, instructions for an assignment, etc.)
Materials	• 8 - 10 small, blank cards (size about 5 x 7 cm, 160 grams paper) per person • 1 sheet of paper (A3-format) and a dark coloured marker per person.
Equipment	• Flip chart or board to write down the list of reference persons
Source	Patrick Boel, with courtesy to George Wollants (BE, 1979), Gérard van Eyk (NL, 1979) and Albert Zweers (NL, 1990), June 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• (Date, situation, target group, facilitator) • (Reflection of the facilitator + suggestions)

Title	# ICE BREAKERS
Subtitle	

SUMMARY

Instructions for a series of ice breakers just for fun, as a game and/or around a topic. They are meant for small and large groups of all sorts, in many different situations and taking from 5 up to 45 minutes.

DESCRIPTION

Introduction

Ice breakers, energizers and games are basically used in many situations to break the monotony of long periods of sitting. It (re-)vitalises the group and very often also has some additional objective in line with the objective of the subject of the session.

Objectives

- To break the ice between participants and creating a more open, informal atmosphere.
- To energize participants
- To introduce / illustrate / practice a topic in a more playful, humoristic way.

Outputs

A combination of good atmosphere, energy and insights about the subject and the people.

ICE BREAKERS JUST FOR FUN

Sitting Wheel (5 - 10 min.)

- Make a circle with the group.
- All turn to the right (face-to-back) and then lowers themselves until they sit on the knees of the person behind her/him. The person in front sits then on the knees of the person behind her/him.
- Start in that position moving, little step by little step, so the circle turns like a wheel.
- Let them try again, if it didn't function the first time.

Knot (5 – 10 min.)

- Have all stand closely together in one group.
- With their eyes closed, ask them to raise their hands up and grasp two other hands (not of the same person).
- They should then open their eyes and try to undo the "knot" without letting go, until they form a circle.

Rectangular (10 – 15 min.)

- Have the group (20 or more people) standing in an open space in the room (or outside on the terrace or lawn)
- The group forms a rectangular. They should memorise their left and right neighbour, and the people in the corners.
- Stand in the middle with your arms parallel to the long side of the rectangular.
- Then you turn 90 degree. The whole group lines up again, in order to have the same original position, compared to your position.
- You might also move to another place as well. The group has to follow and line up as quickly as possible.

ENERGIZERS

Waving Gibberish (5 min.)

- Have the group standing. Everybody breathes deeply a few times
- All wave with their hands, at first slowly and then faster. Let arms hang.
- Now all move their hands, while waving, up and down. In the mean time they make some undistinguishable sounds (gibberish).

Let off steam (5 – 10 min.)

• Have the group standing. Everybody takes a few deep breathes • All stretch their arms in front of them. • They breathe in slowly and bend in the same time their arms until their hands touch their shoulders. • They breathe out slowly while stretching their arms. • Let them repeat this three times • Now all do the same thing, but much more powerful and quicker. Arms move simultaneously. This also three times.
Aerobics (5 min.) Put on the music and let each one dance for three minutes. A few minutes of aerobic dancing will send the circulation going and will bring squeals of delightful laughter.
'Changer' (5 – 10 min.) • Ask the group to help you to turn the whole setting of the room 90 or 180 degrees or move all tables out. • Change rooms
Energy (1 min.) Present raisins, fruits, cookies, candies
RELAXATION
Back Rub (5-10 min.) • Make the group sit comfortably on the floor in a circle. • Then let them all turn 90 degrees to the right. • They will then each have a back to massage for a few minutes. • The back rub can ease up not only physical but also psychological pains.
Breathing for the unknown (5 min.) • Make the group sit comfortable • Let them close their eyes and listen to you. • Tell them to breathe relaxed, and let their mind wander to where there is no immediate answer or reaction on their thoughts.
Relaxation I (10 min.) • Tell the group that they are going to participate in a relaxation exercise. • Make sure that none of the participants suffer from dizzy spells or breathing problems before they begin the exercise. • Tell them to sit comfortable in a straight position with their feet on the ground. • Let them close their eyes, breathe relaxed and listen to your instructions. • Now read the group the following: *'Concentrate all of your thoughts into your right arm, stretch your arm out straight in front of you and make a tense fist and tense all the other muscles in your arm as well. As you do this take a deep breath and say to yourself: "Let." Breathe out slowly after about 5 seconds and say to yourself: "Go." Place your arm slowly down by your side and feel it relax completely.* • Follow the same procedure for the left arm, the right leg, the left leg, the back muscles, the neck and lastly the face muscles. • Soft, slow background music may be used to improve results.
Relaxation (visualisation) II (10 min.) • Tell the group that they are going to participate in a relaxation exercise. • Make sure that none of the participants suffer from dizzy spells or breathing problems before they begin the exercise.

• Tell them to sit comfortable in a straight position with their feet on the ground. • Let them close their eyes, breathe relaxed and listen to your instructions. • Now ask the group with some short intervals; • Listen to your breath - Experience your feelings - Concentrate with your minds eye on your back, - your neck, - and your head. - Imagine that a rope from the ceiling supports the weight of your head. • End the exercise after a few minutes.	
GAMES	
Money Circulation (15 min.) • Break the group into teams of around 8 persons. Each team lines up. • The first person of each team gets a coin. • S/he puts the coin at the neck into her/his clothes and shakes until it falls from under her/his clothes onto the floor. • The second person grabs the coin and repeats the same procedure. • And so on till the last one. • The first team that completes the assignment wins.	
'Block at the leg' (15 min.) • Break the group into teams of around 8 persons. Each team lines up in pairs. • The left person of each pair ties his right leg to the left leg of her/his partner with a piece of rope. • At a signal the teams has to run to the finish.	
Bless you, sister (5 – 10 min.) The 'Bless you, sister' is a fun (and useful) exercise, because it helps to create focus and concentration, and involves the whole group. • Have the group standing in a circle facing inwards. • Explain the game: - One person starts the game by walking solemnly across the circle to face another person whom s/he greets by bowing and saying the words 'I bless you sister (or brother)' and then giving that person a funny name – any name – e.g. 'I bless you Sister Longlegs' or 'I bless you Brother bountiful'. - The objective of the game is to play it without laughter. Any player who does laugh is 'out' and has to sit down. - If the 'sister/brother' doesn't laugh, then s/he continues to another person across. • Ask one person to start. • Continue until just two players remain.	
Line-up • Break the group into teams of 12 – 20 people. • Let them line-up by for instance shoe seize and clap their hands when they are ready. The group who claps first wins. • Now the real competition starts with 2 or 3 rounds, for instance: - Line up in order by length of arm's reach. - Line up in order alphabetically by favourite colour. - Line up in order by number of siblings you have. - Line up in order by hair colour, lightest to darkest.	

- Line up in order by age, youngest to oldest.
- Line up in order by length of time with current employer.
- Line up in order alphabetically by first name.
- Line up in order alphabetically by last name.
- Line up in order by number of pets owned.
- Line up in order by hair length, longest to shortest.
- Line up in order by the number of bones you've ever broken.

• Keep score and announce the winner.

BRAIN TEASERS

The Six (5 min.)

• Write IX on the board / flip chart.
• Ask the group how you can turn this into six (ask it orally)

Solution : Add an S before the IX

Connecting dots I

• Draw the figure with the six dots on the board or flipchart.
• Ask the group to draw the figure with the six dots on a piece of paper.
• Now the have to connect the dots with three straight lines, without taking your pencil from the paper.

```
*    *    *

*    *    *

*    *    *
```

Connecting dots II

• Connect the dots with three straight lines, without taking your pencil from the paper.

```
                    *

          *                   *

*                                       *
```

Send more money

• Write on the board /flip chart:

```
  SEND
  MORE
------------ +
 MONEY
```

• Each letter represents a figure. Equal letters are equal figures.
• What are the figures, to make a correct calculation?

Triangle

• Place ten coins in the shape of a triangle on the table or overhead projector, with on corner up:

```
   O
  OO
 OOO
OOOO
```

- How many coins do you have to move minimally, to have the triangle with the corner down (up-side down)?

Solution : 3

TEAM WORK & CREATIVITY

Human Machine (10 – 15 min.)

- Break the group into teams of 8 - 12 people.
- Give the teams 5 minutes to design a ‘human machine’, where the members are all components of the machine. All of the human components rely on each other for movement, that is one action leads to another.
- When the planning time has ended each team has to demonstrate its ‘human machine’.
- The whole group selects the best design.

Egg Game (± 20 min.)

- Hang two eggs at the ceiling with a rope. The egg should be about two meters above the floor.
- Break the group into teams of 5 – 7 people.
- Each team receives a set of material: 20 sheets of paper (max. A3), tape, rope, small pieces of wood, stapler, scissor, pencils, etc.
- In 15 min. they have to make a ‘construction’ to catch the egg and prevent it from breaking, when it falls down.
- Cut the rope with a scissor to test the construction.

COMMUNICATION

Telephone (5 – 10 min.): communication

- Have the group sitting in a circle.
- Ask someone to start by whispering a short message in the ear of the next person.
- This person whispers it in the ear of her/his neighbour. And so on.
- Let the last person say aloud what message s/he received.
- Reflect with the group on what the outcome tells us about communication.

GENERAL PROCEDURE

Introduction	• Explain the objective and procedure
Ice Breaker	• Conduct the ice breaker with the group
Reflection	• ‘Did everyone feel comfortable with the exercise?’ • ‘Did it work?’ • ‘How do you feel now?’ • ‘Has everyone’s lunch now settled?’
Closure	In general refer to the objective of the ice breaker and link with the overall programme.
Tip	Wait with the reflection and closure until the group has wind down (and is seated again) to have their attention.

PRACTICALITIES

Materials	• For some of the ice breakers paper, markers, utensils, etc. are needed.
Further reading	• IRC-FN: Line-up • Business FUNdamentals, Inc. : www.businessfundamentals.com
Source	Patrick Boel, with courtesy to • David Gershwin (US, 1985) for the ‘Rectangular’ • Pat Wagner (US, 1989) for ‘Waving Gibberish’ • Odulf van Someren (NL, 1995) for the ‘Money Circulation’ • Félicité Chabi-Gonni (BF, 2006) for ‘Bless you, sister’

	• Edmée Schalkx (NL,1994) for the 'Egg Game' • Business FUNdamentals, Inc. for the 'Line-up'
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• (Date, situation, target group, facilitator) • (Reflection of the facilitator + suggestions)

Title	# INCIDENT METHOD
Subtitle	***A method to learn with/from your peers***

	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	The incident method is very appropriate to learn with/from peers (4-6 persons) how to deal with complex situations from different perspectives. It takes 30 – 60 min. per problem.
	DESCRIPTION
Introduction	The incident method is used among peers, who want to learn with and from each other, in a very practice-oriented way. They bring in their own personal experiences, know-how and ideas. This method prevents: • 'Yes, but .....' discussions • that solutions be continuously rejected. • that people no longer participate in the conversation. • that there are no solutions at the end of the conversation.
Objectives	To learn with and from each other, in a very practice-oriented way.
Output	The group discusses a real problem / question / situation from one of the members. He/she is the problem owner. It could be a case, which is already solved. Then the objective is to investigate alternatives: what could have been done differently, better. Or it could be a present situation, for which the problem owner wants assistance from the group how to deal with the situation.
Topics	Any more complex problem of which the other members have (similar) experiences and/or useful expertise.
	WHEN TO USE
Situation	The incident method is very appropriate to learn how to deal with complex situations and (business) relations from different perspectives. The method is specifically meant for dialogue and discussion.
Target group	A group of 4 – 6 persons peers, which could be colleagues from one organisation, but also from different organisations. The value can be raised thought unprejudiced input from qualified outsiders.
Time	It takes 30 – 60 min. per problem.
	PROCESS
Procedure	The procedure of the incident method is as follows: 1. The problem owner explains the *problem / question*, without formulating / indicating the solution. 2. The other members of the group ask *informative questions* to get a better understanding of the various aspects of the case / the situation. 3. The group *analyses* the case and the various aspects. The problem owner does not participate in the analysis; just listen. There should be no discussion among the members of the group about each other's contribution. 4. Each member now presents one or more *solutions* from his/her own point of view. Eventually everybody first writes down the solution(s) before this round of presentations. 5. The problem owner tells what he/she *likes*/does not likes in the various solutions.
	By doing a second round, in which an additional question /problem is raised and/or the question is made more specific, the solutions could be further enriched.
Methods	• Dialogue • Asking questions

Reflection	• Does somebody want to say something? • Anything remarkable that strikes you? • Differences? • How was the exercise going? How did it work for you? • Do you like this method? • Do you see any other possible applications?
Closure	•
	PRACTICALITIES
Handouts	Handout with the ‘description’ and ‘procedure’ of the incident method.
Materials	A chart with the procedure (and timing).
Equipment	
Room	Find a place where the group can talk freely and undisturbed.
Further reading	
Miscell.	
Source	Patrick Boel. May, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• When the incident method is new for the participants, indicate the duration of each step (for instance 5 -5-10-5-5 minutes. • Appoint the first time a group member to guard the procedure and the time. • It requires practice and discipline before a group can smoothly use the incident method.

Title
INTRODUCTION INTERVIEW

Subtitle
Get to know each other more in-depth

SUMMARY

Instructions for a range of methods to use at the start of a training or workshop, to get participants to know each other more in-depth and an informal atmosphere. In pairs participants speak out more easily.

DESCRIPTION

Introduction
It makes participants feel more comfortable if they know each other and the introduction can also serve as an ice-breaker.

Objective
Getting more in-depth acquainted with some fellow-participants in a more effective and efficient way.

Output
- Participants feel more comfortable
- A more informal atmosphere.

WHEN TO USE

Situation
At the start of a training or workshop. In case of a larger group (> 10) it is also more efficient then just a round. In pairs participants speak out more easily.

Target group
Participants, who are not familiar with each other and/or only know each other in a functional / formal way.

Time
15 – 45 min., depending on the size of the group and the chosen method

GENERAL INSTRUCTION FOR PARTICIPANTS

Interview
- Interview one fellow-participant and have yourself been interviewed by the same person along the same lines during about 10 - 15 minutes.
- Make a choice or have you chosen. Go for the unknown and adventures; it's up to you.

Plenary
- In the subsequent plenary session you have to present your interviewee with a one-minute speech. You are quite free in choosing your presentation. It is preferable to include at least his/her full name and the first name with which s/he wants to be addressed.
- You should not necessarily give a summary of the interview. Concentrate most of all on what did strike you, did fascinate you, and made you proud to have interviewed this person.

TYPES OF INTERVIEW

Open interview
- Formulate your own questions.

Theme / topic
Specific theme or subject

A given theme or subject, suggested by the trainer/proposed by the group:
- "What is your opinion about.....?"
- "What do you know about ....?"
- "Have you any experience with....?"

Questionnaire
- The trainer prepares a list.

Acrostics
- Hang flip charts at the wall; one for each participant.
- Each participant writes her name (or the name by which she wants to be called during the programme) vertically, with a marker.
- Then she puts an adjective which describes her personality, using each letter. For example:

  Sweet
  f**U**n loving
  Enthusiastic
- Participants walk around the room, reading each others acrostics. When sufficient time has elapsed, each one is asked to choose a partner.

	• The dyads exchange more information about each other, regarding the acrostics. • Partners introduce each other to the entire group. One should not necessarily explain all the acrostics.
Mutual introduction	• Form pairs. • The one person tells the other all the things he/she likes best about him/herself for sixty seconds. Then, the situation is reversed. • Number one then tells number two three or more things which s/he likes to do best or enjoy doing. And number two does the same. • The pairs then decide on three to five similarities that they may posses. These may arise from the information just given or may be entirely new discoveries. It may be physical qualities, emotional tendencies, intellectual capabilities, education, race, culture, etc. • Next they decide on three to five differences they discover between each other. • Finally number one introduces number two to the group and vice versa. After that number one speaks about their similarities and number two about the pair's differences. Questions or clarifications may be asked.
	PROCESS
Procedure	• Explain the assignment • Form pairs • Working on the assignment in pairs • Plenary session
Reflection	• Was this exercise helpful to you in getting to know some other people? • What kinds of items made the greatest impact on you? • How do you now feel about your involvement in this group?
Tip	Stress the fact that the introduction in the plenary session don't need to be complete and is more meant as an appetizer or teaser for further conversations during breaks.
	PRACTICALITIES
Materials	• Have paper, markers, post-its, tape at hand
Room	• Enough space in or outside the room for the pairs to sit and talk comfortable.
Further reading	• IRC-FN: Introduction Round
Source	Patrick Boel, June 2006

Title	# INTRODUCTION ROUND
Subtitle	***Getting to know each other***

	SUMMARY
	Instructions to conduct an introduction round at the start of a training, workshop or meeting to get participants to know each other and to create a more open atmosphere. It takes about 1 – 3 minutes per person.
	DESCRIPTION
Introduction	Before starting the actual work, everybody is asked to introduce themselves in the group.
Objectives	To make participants familiar with each other and their back ground, and to create a more open atmosphere.
Output	
	WHEN TO USE
Situation	At the start of a training, workshop or meeting, where it is sufficient to exchange only limited information as an introduction.
Target group	• People, who at this stage only need some functional information • People, who already know each other but need a little ice breaker
Time	An average of 1 – 3 minutes per person, depending on the kind of introduction.
	INTRODUCTION ASSIGNMENTS
	Formulate an assignment for the introduction, based on what participants might want to know and/or need to know. Make a selection of one or more of the following topics: • Name, function, department / company / organisations • Back ground (work experience, education) • Expectations • Special interest in the subject of the training / workshop / meeting • Contribution to the subject of the training / workshop / meeting • 'What's new?' • Personal situation (such as family, hobbies, vacation, house, etc.)
	INTRODUCTION VARIANT
Interview	• Let the group ask questions to a participant. • Limit it to 3 – 5 questions.
Post card	• Let participants choose a post card from a large assortment and explain what they like about it and/or what it tells about him/her self
Object	• Let participants choose an object from a large assortment and explain what they like about it and/or what it tells about him/her self
	PROCESS
Explanation	• Explain the selected assignment for the introduction round. • Give restrictions (such as three sentences or 2 minutes) • No questions or only some small informative questions.
Round	Conduct a round in a convenient order (circle, 'who wants to start', 'your turn')
Methods	• IRC-FN: Round
	PRACTICALITIES
Materials	• Assortment of postcards and/or pictures. • Assortment of objects / toys / …….
Further reading	• IRC-FN: Introduction interview
Source	Patrick Boel, June 2006

Title
LECTURE

Subtitle
To prove your expertise and the validity of your arguments

SUMMARY

A list of does and don'ts' for the preparation and holding of a lecture, a widely used and well-known method of imparting knowledge to a large audience. A lecture generally takes 30 – 60 minutes.

PREPARATION

Content

- A lecture consists of an introduction part, the actual lecture and a closing part.
- Do not "list" topics:
  - Have them on charts or power point. People can read.
  - Give only additional explanation, examples.
  - Use a silence, instead of a "stop sentence" between topics.
- Proof your expertise; refer to your own experiences.
- Use challenging examples, from credible sources.
- Be clear, avoid jargon.
- Give a maximum of 30% new information.

Programme

- After 20 minutes of plain talking, you loose the audience:
- Make blocks of 4-5 min.
- Insert questions, buzz groups, discussion, silence.
- Use sound, images, audio-visuals.
- Plan a break after 60 minutes.

Practicalities

- Write an introduction about you and your lecture for the chairperson. Be prepared for an insufficient or challenging introduction by the chairperson.
- Have some material available for the press.
- Be well rehearsed and appropriately dressed.

Last minute

- Arrive at least 15 minutes in advance
- Introduce yourself to the chair person and check the programme with her/him.
- Check the size of your audience, the room (your expectations about it).
- Check equipment and setting. Instruct the operator. Check the hand-outs.
- Have you materials at hand, ready to use.

LECTURE

Introduction

- Introduce yourself. Never apologise for your presence or un-experience.
- Start with an anecdote or a surprise.
- Explain the structure/outline and refer to it during the lecture.
- Assess the audience (level, interests) by asking some questions, buzz groups or raising hands.

Presentation

- Address the audience, their characteristics, questions, interests. Show your understanding.
- Ask direct questions to the audience.
- Direct your questions to people, familiar with the subject.
- Refer to hand-outs, manual.
- Summarise in between. Use a one-liner.
- Give an assignment to the audience. Come back on it after a break.

Behaviour

- Be relaxed, confident and enthusiastic. Smile when appropriate.
- Make yourself visible by standing beside the pulpit. Move. Walk around.
- Look at the whole audience. Don't focus on one person.

Methods

- IRC-FN: Power Point
- IRC-FN: Setting of the room

Reflection

-

Closure	•
	LECTURETTE
	A Lecturette is a ‘little lecture or short talk. Ideally, a lecturette should only last about 3 - 5 minutes, but should never exceed 10 minutes in duration. It can be very useful to arouse interest amongst a lot of people during a workshop, training or meeting. Interaction may take place but generally is confined to the end of the talk and is often limited to asking questions. A lecturette can involve reading word for word from a prepared script or the lecturer may use a set of notes or prompts. It is quite common to make use of visual aids such as charts, flip charts, overhead sheets or beamer. Although the types of lecturette may vary enormously, the most common type involves the presentation of a body of knowledge. Each point is made one by one, leading to some sort of conclusion.
	PRACTICALITIES
Handouts	• Hand-outs for the audience • Additional information for the press
Materials	•
Equipment	• For instance flip chart, white board, beamer, (wire less) microphone
Room	• Make sure that everybody can see, read and hear you and your audio-visuals.
Source	Patrick Boel, June 2006

Title	# LEVELLING OF EXPECTATIONS
Subtitle	***"An ounce of prevention is better than a pound of cure."***

	SUMMARY
	Instruction for the disclosure and levelling of expectations and apprehensions at the start of a workshop or training, which will take 15 – 45 minutes.
	DESCRIPTION
Introduction	The expectations and apprehensions of participants and trainers must be disclosed at the first stages of a workshop or training.
Objectives	To level the expectations of the participants with the objectives and content of the programme.
Output	• Confidence by the participants with the programme of the workshop or training • Insights in the needs of the participants
Topics	Expectations and apprehensions of the participants about the programme, the participants and the facilitator / trainer.
	WHEN TO USE
Situation	• At the first stage of any workshop or training.
Time	• 15 – 45 minutes. The longer the programme, the more time should be spend for the levelling of expectations.
	PROCESS
Plenary	**Presentation of the training programme** • Present an overview of the programme. • Use a big chart with a time table • Use post-its to indicate that the programme is flexible.
Subgroup	**Expectations/apprehensions** • Break the group in subgroups, using any convenient method. • Participants talk about their personal expectations: ◊ Expectations of the training in general. "What outcome has there to be for you? When are you satisfied?" ◊ Expectations from the facilitator / trainer. ◊ Expectations from their fellow-participants. • Are there any problems which they foresee might happen during the course of the training programme? • By discussing their expectations and apprehensions in the group, participants already do some of their own levelling
Plenary	**Presentation/discussion** • Each subgroup presents its expectations and apprehensions to the entire group. Questions or clarifications may be asked at this point. • The presented points are discussed, taken into consideration and levelled. • Possible solutions are discussed. If necessary the programme is adapted accordingly.
Methods	• IRC-FN: Subgroups
Reflection	•
Closure	• Signing a learning contract, if appropriate. • 'Gunny sacking' of individual problems and questions that are not addressed or set aside in favour of the task at hand. • Some other ceremony to dedicate the forthcoming day to self- and other-awareness, interactions and meaningful learning.
Tip	Problems may not be solved on the spot but awareness that these may occur during

	the programme will help everyone. Write them on post-its and 'park' them on a separate sheet.
Tip	Explain that expectations and questions are saved, to refer to them now and then, and to determine whether expectations are being met and problems being handled.
	PRACTICALITIES
Materials	Paper, markers, post-its, cards
Equipment	Flip chart, pin boards
Source	Patrick Boel. June 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• (Date, situation, target group, facilitator) • (Reflection of the facilitator + suggestions)

Title	# METAPLAN
Subtitle	***A highly visible brainstorming and discussion technique***

	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	'Metaplan' is a visual brainstorming technique, incorporating elements of brain writing, brain mapping, buzz groups, group discussion and play, for (sub) groups up to 12 persons.
	DESCRIPTION
Introduction	'Metaplan' is a brainstorming technique, incorporating elements of brain writing, brain mapping, buzz groups, group discussion and play. It is an effective and efficient way to involve all participants.
Objectives	To create an open and informal atmosphere in which all participants can contribute
Output	The outputs are directly visible and can easily be used for reporting.
Topics	
	WHEN TO USE
Situation	It can be used in many occasions, when working individually, in meetings, at workshops, even for large conferences. Whenever a visual way of working is useful, (elements of) the metaplan technique can be used.
Target group	In general for groups up to 12 persons. Larger groups can be spit up in subgroups, which each have their own metaplan session.
Time	One session takes between 30 – 45 minutes, but in many cases a cycle of 3 – 5 sessions is required to fully explore and discuss a topic.
	PROCESS
Procedure	**1. Start with a question** Write the question on top of a large sheet of paper. Verify the understanding of the question or issue at hand. Starting with the right question is extremely important. **2. Visualisation** Ask participants for about 10 minutes to write their ideas, comments, and remarks on post-it's/cards. They should use a marker, write readable and stick post-it's/cards immediately on the wall, to stimulate others. Use 'half sentence', not just keywords. A 'half sentence' with a verb is more informative. **3. Clustering** Read the cards aloud. Let participants help in clustering. Give key words to clusters. Break discussion open with a new question or evaluation. In a discussion the '30 second rule' applies to prevent monologues. **4. Informative contributions** If there is a need for more information, allow for an informative contribution. This should take no longer then 5 minutes and it has to be visualised in key words. **5. Evaluation** Let participants score on scales, categories, priorities. **6. Mood chart** Let participants during longer sessions indicate their mood on a mood chart to get an impression about expectations, feelings, and progress.
Programme	• **Planning** Make a list of themes, time schedule, priorities. • **Subgroups / plenary**

	Break in between sessions in smaller groups for discussion and formulating new questions • **Breaks** Plan sufficient time for breaks to allow for informal conversations, relaxation, fresh air, and breakthrough.
Methods	The moderator facilitates the process and moderates discussions. He/she can use a wide variety of tools and methods, using creativity. Each METAPLAN sessions is different.
Reflection	Mood chart with three boxes and smileys: smiling , indifferent, sad
Closure	
	PRACTICALITIES
Handouts	
Materials	• Large sheets of paper (at least 80 x 125 cm) • Post-its or cards (9,9x21cm), dots and markers; all in different colours and sizes. • Tape to stick the sheets to the wall.
Equipment	• Most convenient are pin boards for sheets and cards, to be more flexible. • A camera to make a report
Room	• A nice environment with enough space for an appropriate setting
Further reading	• IRC-FN: Design of a setting • www.neuland.nl • www.neuland-online.de • www.neuland.bizz
Miscell.	
Source	Patrick Boel May 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	

Title	# ROLE PLAY
Subtitle	

	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	A role play is an enacted representation of a real life situation, to practice interpersonal skills, to learn from experience and to experience the feelings evoked by performing various roles.
	DESCRIPTION
Introduction	A role play is an enacted representation of a real life situation of the participants. They can play their own role (for instance the sales person) and/or the role of an other important person in the situation (for instance the client).
Objectives	A role play may can various objectives: • to practice interpersonal skills • to learn from experience • to experience the feelings evoked by performing various roles.
Output	New insights, which enable the participant to perform better in the real situation.
	WHEN TO USE
Situation	Some questions / requirements: • Has trust developed within the group? • Are they familiar with role-play? • Is the role-play the most appropriate way of dealing with the material? • You may be using it just because you enjoy it yourself? • Are the objectives clear?
Target group	Have a maximum of 6 players to make the role playing not too complicated. The rest of the group gets other tasks like observer, helper and audience. If the group is not familiar with role play, then take ample time for the introduction to ensure that the group feels comfortable.
Time	The role play itself takes about 10 minutes, but sufficient time is needed for preparation and reflection. In total it will take at least 45 – 60 min.
	PROCESS
Procedure	**Introduction** Negotiation is the key, because participation has to be voluntary. Hence it is important to have alternatives for the whole group/those who opt out. • Introduce the topic of the session, reasons to use a role-play, objectives, voluntary, and alternatives. • Discuss effectiveness and learning opportunities. • Talk about fears, feelings and how to handle them. • Be clear, and make it clear to the participants, what the objectives for the session are. • Explain criteria for success, good behaviour. **Dividing the roles** • Players, observers, moderators, summarisers, controllers, researchers, couriers, writers, supporter, etc. **Briefing roles** • Players: Informal/verbal/written out/in class/separately. Depending on the objectives participants can fill in their own role or task. • Observers: specific instructions to watch out for things relevant to the objectives of the session. • Moderator: some of the participants

	Instruction • Use of props and equipment. • Preparation: role, tasks, room • Any special rules. • Time schedule **Debriefing** • Invite *at first* the players to express their experiences, feelings, comments etc. • Ask observers to give their observations. • Ask the players to comment on the observations. • Encourage constructive criticism. • Make your own comments at the end.
Role facilitator	• The common role is observer and moderator. • The facilitator can also be a player, to demonstrate good practice. Make sure that you are still able to manage the situation when playing.
Reflection	• How did it work for you? • What did you learn from it? • What are you going to do next time, when this situation occurs?
Closure	Relate the outcomes to the objectives of the session.
	PRACTICALITIES
Handouts	Role descriptions, instruction, written material.
Materials	Props: tables, chairs, phone, etc. It might be part of the preparation by the participants to organise the necessary props.
Equipment	Equipment: flip charts, markers, video, etc.
Room	The participants organise the setting of the role play and the audience.
Further reading	• IRC-FN: Asking questions
Miscell.	
Source	Patrick Boel Mau 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• Because participants tend to miss / forget part of the briefing and instruction, it is helpful to have them on paper to hand out. • It is important that the key players start in the debriefing with their experiences.

Title	**SING ON AND FIND YOUR COMPANION**
Subtitle	***A cacophonic but effective ice-breaker***

	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	A rather long method (1 h) to break the ice within groups of individuals that really don't know each other. Obviously takes all the longer time than the group of participants is large.
	DESCRIPTION
Introduction	Using popular common identity attributes such as famous songs is a good way to create a nice and open atmosphere, while still introducing each participant and their main characteristics.
Objectives	To get participants to know each other in a (funny hence) relaxing way, develop a bond and set a good spirit for the event.
Output	• Presentation of each other ; • Experience with the methodology
Topics	Personal introduction (organisation, function, activities, interests)
	WHEN TO USE
Situation	At the beginning of an event, when participants don't know each other yet.
Target group	All participants, in pairs of 2 (though this could be adapted)
Time	Typically about 1h30 min for a group of 20 people
	PROCESS
Introduction	Introduce the method if participants aren't familiar yet with it.
Instruction	• [Hand out the papers featuring the song to all participants] Explain the procedure: • Sing out loud your song to find your companion, who will be singing the same song. • When you have found each other, sit together for 10 min. and tell each other your name, organisation, function, activities, (potential interests etc.). • When you are done, you will all come back to your seats and stand up couple after couple and introduce each other (option: but first singing the song together and then introducing one another). • Then you will get back to your chair and listen to the others. • Make sure that everyone understands the procedure.
Procedure	**15 min. Preparation** • Prepare x pairs of two papers containing the name of 10 different songs. Each pair contains the same song. • Hand out the papers to all participants **10 min. Singing** • Everybody's singing to find their companion. Not authorised to talk. **10 min. Discovering each other** • Find out about name, organisation, function, activities, interests. Etc. as much detail as wanted **1 hour Presentation (10 min. / pair)** • [Option: first sing together the common song] • Introduce each other
Reflection	• How did you experience the procedure? • Was it easy to find your companion in all this noise? • Did you find it interesting and different to introduce each other this way?
Closure	• The exercise closes when all pairs have sung their song and introduced each other.

Comment [ELB1]: Number of participants / 2

	PRACTICALITIES
Handouts	N/A
Materials	Paper sheets with song written on it.
Equipment	Paper, pens.
Room	Large enough to get all participants to hear about each other.
Further reading	
Miscell.	
Source	SEUF Kerala, June, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	•

Title	# WORKING WITH SUBGROUPS
Subtitle	***Aspects of working with subgroups.***

	SUMMARY
	Subgroups of 4 – 6 people allow for a more intensive and efficient interaction between the participants. There are various aspects to take into consideration when working with subgroups during a session with a larger, plenary group.
	DESCRIPTION
Introduction	Breaking up a larger group into subgroups is a commonly used to enhance interaction and active participation. In the plenary session can be elaborated further on the outcomes. A subgroup works on a specific assignment in a limited time period. Important aspects of working with subgroups are the assignment, the reporting and the composition.
Objectives	To enable / enhance a more intensive and efficient interaction and active participation
Output	• Direct output is the result of the assignment. • Indirect output is greater involvement of participants towards the work / task and each other.
	WHEN TO USE
Situation	• To break the monotony and passive participation during a plenary session. • Whenever an active contribution of all participants is needed / expected. • Whenever a more safe and convenient environment is needed for interaction, for instance because many people don't feel comfortable to talk in a large group and/or in front of a large audience,
Target group	When forming the subgroups it is important that at least one or two participants have some experience to work independently on a given task in a small group.
Time	Time need to be allocated for the instruction and formation of the subgroups (5 – 15 min.), the actual assignment (20 – 45 min.), the reporting (5 – 10 min. per subgroup) and the reflection / closure (5 – 15 min.). Especially adults take an assignment seriously and need ample time for discussion.
	INSTRUCTION
Assignment	• Formulate the assignment(s) clearly and precise. Explain the objective. • Let some of the participants repeat the assignment, to ensure that they properly understood it. • Encourage questions about the assignment, but avoid discussion.
Formation	• Form the subgroups (see below). • Write eventually the compositions of the subgroups on flip chart / white board to avoid misunderstandings.
Reporting	Include in the assignment what and how subgroups have to report (see below)
Time	• Explain the available time and when they have to be back in the plenary room?
Room	• Explain where they can find rooms or space to work. • If appropriate assign rooms to subgroups
Consideration	• It is easier to hold the attention of the group, when explaining first the assignment • If the group has a saying in the formation, then the assignment has to be explained at first anyway.
Tip	Make sure they understand the assignment **before** they leave the room. It can be helpful if they receive the instructions also on paper. Think carefully about the formulation of assignment / question ('Garbage in, garbage out !')
Tip	If there is resistance to do the assignment, then there are some options :

	• Use authority, but don't force. • Ask for credit to do the assignment anyway and evaluate afterwards. • Ask what is needed to be able to participate, and try to accommodate. • Be aware that the resistance could come only from a minority. Don't give them too much attention to avoid animosity in the group. • If there is resistance from the majority, then be flexible. Give yourself and the group a break to think of an alternative.
Tip	• A break at the beginning of the assignment can be used by the group to settle themselves in their rooms. • A break at the end of the assignment allows for some flexibility, especially when groups need some extra time to prepare the reporting.
Tip	Don't hesitate to let subgroups work outdoors, enjoying fresh air, a change of environment and physical movement.
	ASSIGNMENT
Option 1	Each subgroup has an **identical** assignment, to compare experiences / outcomes, to get different perspectives on the same issue.
Option 2	Each subgroup has a **different** assignment.
Consideration	In most cases the assignment is identical, to give everybody the same learning experience. If the composition of the subgroups is not heterogeneous and/or there are different aspects or issues to work on, then it could be more appropriate and efficient to give different assignments.
Tip	If an assignment takes more then 45 minutes it is better to include a break for a short plenary session to see how everybody is doing.
	FORMATION
Free choice	• Let participants choose for themselves. • Ask them to give three preferences. • People choose a comfortable space in the room and see who joins them there. • Some key persons choose in turn, who they want to have in their subgroup.
Random	• Divide the circle in parts. • Let them count from 1 till …, depending on the number of subgroups you want to make. The one's go together, the two's', etc.
Composition	• Make the composition yourself. • Equal representation of different factions in each subgroup. • Homogeneous or heterogeneous. • Depending on involvement with / knowledge about the issue.
Considerations	• Main reasons to choose for a certain composition have to do with the issue / assignment or the personality / qualifications / background / interests of the participants. • Sometimes it is better to 'manipulate' a bit to get the right people together.
	CONTENT OF THE REPORTING
Options	• Summary of the discussion / activities. • Only some highlights • Only outcomes that might be interesting to know for the other participants. • Questions / issues for further discussion. • Experiences with the way of working • Learning experiences
Considerations	• The content of the reporting depends on the objective of the assignment. Sometimes it is just enough to report highlights or experiences.

	WAY OF REPORTING
Options	• Each group reports in a plenary session (short explanation, on flipchart). • A representative of the group could do the reporting, with some additional reporting by the other members. • Each group gives a presentation in whatever format (speech, play, …). Choosing the format could be part of the assignment. • The first group gives a complete report. Other groups add to it. • One subgroup is interviewed by another subgroup about the outcomes.
Considerations	• Especially when groups have the same assignment, there is the risk of repetition in the outcomes. • Be aware that reporting could take quite some time, because of questions and discussions about the outcomes.
Tip	Let the subgroup write the outcomes on flip chart, cards or post-its, to support the presentation visually and to have some material for later reporting about the session.
Tip	Another format, such as a role play, a drawing, a collage, music or a video, could enhance the outcome, creates variation and energizes the participants.
	PLENARY
Reporting	• Reporting by the first subgroup. • Allow for informative questions and some limited discussion about the outcomes of this subgroup. • Continue with the next group
Reflection	Some questions: • What do you think about the outcomes? • Where are we now? • Did we achieve the objective? • How did it go in your subgroup? • How was the cooperation? • What did you learn from this assignment?
Closure	It is Important to link the outcomes to the objective of the assignment and the overall programme of the session.
Tip	Park major discussion topics for later.
	PRACTICALITIES
Handouts	• Instruction for the assignment
Materials	• Flip chart paper, markers, post-its, cards. • Props, depending on the format of the reporting.
Equipment	• Flip chart, pin boards, video, CD-player
Room	• Let each subgroup choose the setting of the room.
Further reading	• IRC-FN: Facilitation of learning • IRC-FN: Theme centred interaction (TCI).
Source	Patrick Boel. June, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	

Title	# BODY LANGUAGE
Subtitle	***Observe, but don't draw premature conclusions***

	SUMMARY
	Some tips to let your body language speak for you in communication and relationships. The effect of non-verbal communication is 5x stronger then the verbal.
	DESCRIPTION
Introduction	The effect of non-verbal communication is 5x stronger then the verbal. If verbal and non-verbal are contradicting, then the latter will be believed. Feelings and/or the relationship between people is mainly expressed through non-verbal communication
Objectives	To improve your communication.
Output	Ability to communicate better by using body language in a consistent way.
Topics	Aspects of body language are: appearance, posture, distance, eyes, mouth, voice, gestures, hands
	DO'S AND DON'TS
Appearance	*People are judged by their **appearance** (stereo types).* • Be appropriately dressed. • Does you appearance support what you are saying? Not mixing the messages?
Posture	***Posture** expresses dominance, interest, affection, relaxation.* • An open posture, upright, forward. Take a relaxed position, have your legs crossed. Be at the same height as the other person. • Don't cross your arms. • Don't put your feet on the table or slouch in your chair. • Don't hide behind a desk.
Distance	*We have a personal **zone** (family, good friends), a social zone (business relations, acquaintances) and a public zone (unknown, non-sympathic)* • Not too near, in accordance with the appropriate zone. • Not too far.
Eyes	***Eye** contact expresses recognition, remembrance, influence, affection.* • Look at the person. • Gaze open and direct. • Maintain eye contact. • Don't look away or stare at one person.
Mouth	*A **mouth** is very expressive* • Jaw relaxed. • Smile friendly. • Don't frown or scowl. • Don't chew pen or pencil.
Voice	*The sound of the **voice**, the talking speed, the melody and silences tell something about inner feelings.* • Speak interesting. • Speak clearly and audibly. • Not too loud, sarcastic or sneering.
Gestures	***Gestures** put extra emphasis and show feelings, such as nervousness, anxiousness or unsteadiness.* • Appropriate and not overbearing. • Don't point with one finger. • Don't appear tense and anxious.

Hands	• Have open palms; • Hold your hands at your side. • Don't clench your fists. Don't put your hands in your pockets or have them hidden otherwise.
	PRACTICALITIES
Further Reading	• Nonverbal Dictionary of Gestures (www.members.aol.com/nonverbal2/diction.htm)
Source	Patrick Boel, June 2006

Title	CHAIRING A MEETING
Subtitle	

	SUMMARY
	Instruction for chairing a meeting: preparation, invitation, tasks
	PREPARATION
Planning	• In case of regular meetings (for instance work conference, board meetings), organise them on the same day and the same time. • A maximum of two hours, without a break. • Discuss a tentative agenda with those participants, who have a special role / task in the meeting, such as preparing materials and presenting information.
Venue	Criteria for the selection of a venue : • Comfortable, enough space • Quiet, no interruptions • Travel distance by car, public transport, parking • Accessible for handicapped people • Service, refreshments, food
Organisation	• Make reservations for the meeting room, setting, refreshments • Organise equipment, such as flip chart, beamer, markers etc.
Last minute	• Arrive at least 15 minutes before the start of the meeting. • Check the room, equipment, refreshments • Check the reception, signs.
	INVITATION
	• Make a distinction between informative and problem solving meetings. If both aspects are involved, separate them clearly in the agenda. • Make an agenda. Ask people at fore hand if they have any issues. • Formulate for each point of the agenda what the outcomes should be: decision, suggestions or comments. • Announce the meeting and invite participants in time.
	CHAIRING THE MEETING
Tasks	1. To open the meeting 2. To check the agenda 3. To introduce a new subject 4. To take care of the time 5. To pass the word 6. To stop people interrupting 7. To summarise the discussion in between and at the end 8. To stimulate contributions 9. To guide the decision making 10. To organise voting 11. To handle procedures 12. To mediate in conflicts 13. To close the meeting and check the appointments 14. To set a new date for the next meeting
Procedure	• Keep the meeting strictly on schedule. • Give the meeting absolute priority. No phone calls. No interruptions. • Decide at the beginning how the minutes should be made: a short description of the subject and the decision plus tasks. • Be aware not to dominate the discussion. • Close discussion if there is to less information and schedule the issue for a next meeting.

	• Choose a procedure for decision making • Ask for confidentiality. Who gets the minutes? • Conclude each point on the agenda. • Evaluate the meeting
	PRACTICALITIES
Further reading	• IRC-FN: Setting of a room • IRC-FN: Discussion • IRC-FN: Visual Talking
Source	Patrick Boel, June 2006

Title	# GIVING FEEDBACK
Subtitle	***The focus is on behaviour and not on the person!***

	SUMMARY
	*A short instruction to give **constructive** feedback, which increases self-awareness and offers options and opportunities for change of behaviour.*
	DESCRIPTION
Introduction	Constructive feedback does not only mean positive feedback. Negative feedback, given skilfully, is just as important. It does not mean simply telling someone what you think of them. If one does not accept the feedback, he/she has at least to know what is and is not acceptable behaviour and what the consequences are.
Objectives	Feedback is a way of helping others to examine how well their behaviour matches their intentions, thereby keeping them on target to achieve their goals.
Output	Increasing self-awareness and change of behaviour.
	WHEN TO USE
Situation	Feedback is about things / behaviour, which can be changed.
	GIVING FEEDBACK
Preparation	Think over carefully in advance what you want to say: • Feedback is only useful when it is *helpful* to the receiver. • Pause to examine the reason for giving feedback. • Feedback on *one item* at a time is enough. Set priorities.
Content	Feedback should act as a mirror, a clear report of what happened: • Be *descriptive* rather than evaluative. ‘I observed / heard / noticed ....’ • Focus on the *behaviour* rather than the person. • Be *specific*, not general, quoting examples of behaviour. • Feedback should only be about things that can be *changed*. • It should always include *positive* suggestions for improvement.
Timing	Timing is important: • Feedback should be given *immediately* after the behaviour. • Don't save it up, especially negative feedback. • Give critical feedback *not in front of others*.
Giving feedback	• Start with the *positive*, then give suggestions for improvement and end again with something positive (‘sandwich method’). • Check if your feedback is fully *understood*. • Explain what the observed behaviour / experiences do to *you*. • Ask if the receiver can do something with the feedback. • Both giver and receiver should have the *opportunity to check* the accuracy of the feedback. Is this impression shared by others? • Ask if the receiver needs any *support* from you or others. • Show *respect*.
	RECEIVING FEEDBACK
Tips	• Control yourself, when giving a first reaction. *Don’t be defensive*. • Ask for *clarification* (examples of behaviour). • Ask for *suggestions*, what the feedback giver wants you to do more or less. • Decide for yourself if you *agree or disagree* with the feedback. • Check the feedback with others if you feel insecure about it. • Thank for the feedback.
	EXAMPLE

Feedback	"John, overall your drawing is good but I notice that the variable cost line is incorrect. If you do that part of the exercise again, following the example of last week, you should have no problem in getting it right."
Not to do	"John, there are mistakes in your drawing. I'm very disappointed in you, you are always making mistakes. If you listened to me instead of daydreaming you might get some work done properly."
	PRACTICALITIES
Further reading	
Source	Patrick Boel June, 2006.
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	

Title
ASKING QUESTIONS

Subtitle
Examples of interactive questions for a facilitator

SUMMARY

Typology/ Objective / Time/ Target group/ Situation

Asking questions is one of the key skills of a facilitator, to assess the level of participants and to stimulate participation, thinking, reflection, learning and self-management.
This note contains a list of all sorts of questions, which can be used during a presentation, a discussion, a reflection, a training, a learning dialogue, a coaching session, etc.

DESCRIPTION

Introduction

Asking questions is one of the key skills for a facilitator.

Objectives

By asking questions the facilitator stimulates participation, thinking, reflection, learning and self-management of participants.

Output

In this way the facilitator helps the participant to find the answers.

WHEN TO USE

Situation

Examples of situations are a presentation, a discussion, a reflection, a training, a learning dialogue, a coaching session.

TYPE OF QUESTIONS

Situation

General typology of the different kind of questions, which can be used in all sorts of situations.

1. Closed question ('yes/no'):
- Do you prefer alternative A or B?
- Are there two or three options?

2. Focused question ('digging deeper')
- This is the proposal. What do you think of it?
- What do you mean exactly?

3. Open question ('what, why, how'; informative)
- How do you appreciate the alternatives?
- How many options are there?
- What are the issues as you see them?

4. Suggestive questions
- Do you think too …...?

5. Rhetoric questions (an answer isn't expected)
- Aren't we all …….?

6. Summarizing questions
- So, if I understand it well ……..?
- Am I correct, when I …?
- Listening to this, it seems to me that the key issue is ….?

Tips

Practise with formulating open questions.

PARTICIPATORY QUESTIONS

Situation

Type of questions to stimulate participation during a presentation. Depending on the answer the facilitator gives additional information or decides to adapt the session.

Questions

1. Interactive questions

The participant gives an answer, which is the starting point for further action by the facilitator and/or the participant :
- What is an example of …?
- How would you define this?
- Which aspects do you see here?

	• What is your question? **2. Questions, of which the facilitator already knows the answer** The participant gives the right or wrong answer. **3. Rhetorical question** No answer is expected.
Tips	Especially with interactive questions the facilitator needs to be prepared for flexibility in the programme of the session..
	LEARNING DIALOGUE
Situation	In a learning dialogue the facilitator *guides* the participants through the levels and steps of the action learning process: single loop, double loop, deutero
Level/ Questions	**SINGLE LOOP LEARNING** **Step 1. Observation** *Getting a clear picture.* • What went on? What happened? • Which aspects do you distinguish? • What did you observe? What were you impressions? • How did you feel about that? What moved you? • What struck, fascinated, attracted you about it? • Who had the same experience? Who reacted differently? • Were there any surprises/puzzlement? **Step 2. Reflection** *Gaining insight. Giving meaning* • What does that mean to you? • How was that significant, good/bad, characteristic, typical? • What insight or conclusion lies underneath that feeling/judgement? • How might it have been different? • What does that suggest to you about yourself/your group? • How did you come to the idea for that action? **Step 3. Planning for action** *Planning for action* • How could you apply/transfer that? • What would you like to do with that? • How could you repeat it again? • How could you make it better? (consequences, modifications,) • What will you do differently next time? • What do you need to know more?
Tips	• Avoid 'why'-questions. They lead to analysing instead of conscious observation. Or they lead to answers about motivation and to defensive behaviour. Better ask 'what'-questions. • Ask further questions, when answers are negatively formulated. The thing is what it is, not what it isn't.
Level/ Questions	**DOUBLE LOUPE LEARNING** **Step 2. Reflection** *Awareness* • What are the underlying concepts, values? • What principle/law do you see operating? • Are they different from what you expected? What are the differences? • Do you have an explanation? • Does that remind you of anything? • What is the meaning, intention? Does it make sense? • What puzzles you? • Do you recognise your mental model? **Step 3. Insights** *Gaining new insights.*

- What might we draw/pull from that?
- Is that plugging into anything?
- What does that suggest to you about ...... in general?
- What do you associate with that?
- So what?
- Can you reframe the issue?
- What are the new insights you gained from this experience?
- What are appropriate/necessary changes?
- How do you feel about these new values?

Step 4. Theory *Generalisation*

- How would you formulate these new insights?
- Do you have a hypothesis?
- What assumptions would you make for future action?
- Could you express your thoughts about this issue in one sentence?

Level/ Questions

DEUTERO LEARNING

Learning to learn

- Observation: What are you looking for?
- How did the learning take place?
- What helped/hindered learning?
- How do you feel about this way of learning?
- What could be changed to improve the activity?
- What was your contribution to the learning of others?
- What was your contribution to the functioning of the group?
- What was the role of the facilitator? When?

REFLECTION AT THE END OF A SESSION

Situation

At the end of a session in a course/training, in which a particular method has been used.

When sitting together again with the whole group, share experiences:

- Does somebody want to say something?
- Anything remarkable that strikes you?
- Differences?
- How was the exercise going? How did it work for you?
- Do you like this method?
- Do you see any other possible applications?

REFRAMING QUESTIONS

Situation

Questions to reframe situations/reactions from participants.

Reaction/ Questions

"I have no idea."

- Suppose.......
  ... it's not you, but your partner. (change of person)
  .... the closing doesn't take place. (change of circumstances)
  .... we are now 5 years later. (change of time)
- Let us assume that......
- What would you do if......

"I don't know."

- Maybe you know *someone else*, who.....?
- How might ('name') go *about*.....?
- Think a bit *more*....
- What, if you would *guess*?

"I can't."

	• What *stops* you? • What would you *need* to do it? • What must be *different*? **"I don't dare."** • What is the *worth thing* that can happen? • Would you give it a *try*? **"I don't see it."** • What is it you actually are doing? • What business are you in? • The more concave, the more convex. What is the opposite?
	PRACTICALITIES
Further reading	• FN: Facilitation of Learning
Miscell.	
Source	Patrick Boel May, 2005.
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• Prepare your own set of questions, you feel comfortable to ask. • All the information is their, but questions are some times needed to bring it in the open.

Title	# VISUAL TALKING
Subtitle	***An image or symbol says more then many words***

	SUMMARY
	Some guidelines for 'visual talking', because an image or symbol says more then many words, and helps to understand what is said.
	DESCRIPTION
Introduction	In a language there are many expressions, ways of saying, which literally meaning has something to do with moving, positioning, constructing, etc.: • *going* through a process • *side step* • this issue has two *sides* • *top* priority • *step-by-step* • *bring* in • put things in a *row* The principle of 'visual' talking is to structure a conversation by visualizing these expressions when making notes. The writing technique is comparable with the metaplan method.
Objectives	• To support the understanding • To let the audience, as a side effect, gain some knowledge of the language.
Output	The sheet is a visual outcome of the conversation: • Hang it on the wall, to refer to later. • Store it away, to come back on it later. • Use it to make a report. • Give it to your counterpart, to support his/her own notes.
	WHEN TO USE
Situation	Only in some very formal situations it can be inappropriate, because people experience it as an interruption and/or not in line with your role / position.
	PROCESS
	Place a large sheet of paper (for instance flip chart paper) on the table or on the ground, not on the wall. • On the table gives a feeling that everything *comes/lays on the table* • On the ground gives a feeling of an *overview*, a *helicopter view* • On the wall gives a feeling of having to *look up*
	Make notes with markers. • With markers everybody can read your notes • Contributions are noted and don't have to be repeated • It doesn't really matter that they have to read upside-down or in another language. They remember the meaning of what was written at that spot on the sheet.
	Use images, metaphors, symbols, arrows, colours to visualize. • Images are much more powerful to say something • Images help to connect with the right side of the brain
	Refer, connect, point. • They can *see* what you mean • It creates structure
Tip	If you don't know where to place something, write it on a post-it. Park it.

	PRACTICALITIES
Materials	• Paper, with a size between A3 and flip chart. • Markers in different colours and sizes. • Post-its.
Further reading	• IRC-FN: Metaplan
Source	Patrick Boel June, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	•

Title

WORKING WITH AN INTERPRETER

Subtitle

SUMMARY

A checklist for working with an interpreter.

DESCRIPTION

Introduction

- Working with an interpreter can be done in two ways: Simultaneously or intermittent. Some good preparation and some basic rules when talking, makes things easier for the speaker, the audience and the interpreter.
- Interpretation takes a bit more time, but it can also be instrumental to structure the conversation and to provide time for thinking.

PROCESS

Preparation

- Give hand-outs, charts etc. to the interpreter to make him/her familiar with the subjects and the terminology.
- Explain all special terms and discuss the translation. Some words / concepts don't exist in another language and or have a different connotation.
- The better the interpreter understands the subject, the better the translation.
- A glossary with an explanation of special terms might be of great help for the participants / audience as well as the interpreter.
- Be aware in your planning that the translation, especially when it is intermittent, takes some extra time.
- Agree a position where your interpreter will be, when you sit, stand and/or walk around.

Talking

- Don't talk at the interpreter but at your audience.
- Construct your sentences as if there is no interpretation. For example: "I would like to know from you…." instead of "Could you ask him ……?"
- It's not so much necessary to repeat. Most people understand already part of your English. The translation is for them some sort of repetition and clarification.
- Make your sentences not too complicated. Especially when you are a native speaker, make it simple.
- Make little breaks during simultaneous translation for the interpreter to stay with you.
- Make breaks after two sentences when the translation is intermittent.
- Talk as visual as possible!
- Outline the structure of what you are going to tell.
- It's sometimes better when a discussion is not translated. The conversation can flow. Let the interpreter give you some key words simultaneously.
- Observe instead of listen.

'Co-trainer'

Make your interpreter work as a "co-trainer":

- Let him/her chair a discussion.
- Let him/her listen to conversations in subgroups or during breaks.
- Discuss your own observations with him/her.

Tips

- Learn to listen with your eyes.
- Realise that during dinners your interpreter has hardly time to eat.
- Other cultures have a different sense of humour. Most jokes can't be translated.
- Don't interrupt when someone else is talking. It confuses the interpretation,
- Acknowledge at some point to your audience the important role/contribution of the interpreter.
- Allow your interpreter to translate / explain things in other terms if this will help the understanding by the audience.
- Trust your interpreter.

	•
	PRACTICALITIES
Further reading	• IRC-FN: Visual talking
Source	Patrick Boel June 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• Hungary, 1994: 'Sometimes my interpreter could make herself invisible and made us feel we had a private conversation with two, although there were three persons sitting at the table.'

Title	# EMPTY CHAIR
Subtitle	***'We can't do it alone. Neither can it happen without us.'***

	SUMMARY
	Instruction for the 'empty chair' exercise (45 – 90 min.) to help a group (8 – 20 people) to understand the impact of leadership on different partnership models.
	DESCRIPTION
Introduction	Knowing how to create partnership relationships based on equality is not always easy. One of the most powerful ways to experience the need for this shift comes out in The Empty Chair exercise.
Back ground	What follows is a brief synopsis of how leadership impacts on the kinds of partnering models groups adopt. It's worth noting how many different ways there are to avoid establishing truly inclusive partnerships. It's also important to recognise that while the word 'partner' implies a two party relationship – a partnership, like a lively conversation, can include any number of active participants. It's the quality of participation that creates true partnerships. Very often we imagine leadership as being embodied by strong, charismatic, take charge kind of people. And because we imagine this is how our leaders ought to be, these are the kind of leaders we get. Unfortunately, we not only get their strengths, we also get their weaknesses. Strong leaders aren't supposed to be seen as indecisive - so they become petty tyrants and egocentric dictators. Strong leaders aren't supposed to fail – so they become expert at shifting the blame. And yet, we have a direct hand in creating these figures – by the very narrowness of our definition of leadership. A definition that often excludes our own leadership potential. Leadership needn't be embodied in a single person, but can permeate an entire group or organisation, so that leadership is held and exercised by each and every member. This is not the same as saying that everyone is equal – for some are clearly more equal than others – but everyone can take active responsibility for the success of the corporate whole. This principle of leadership is illustrated well in this very simply exercise, called: 'The Empty Chair'.
Objectives	To experience how leadership impacts the partnering models
Output	Insights about leadership, which can be a starting point for a discussion about various aspects of leadership and partnership.
Topics	• Partnership and partnering models • Leadership and team work
	WHEN TO USE
Situation	This exercise is excellent as a warm up exercise for discussions on leadership and partnerships. It combines learning with fun.
Target group	• The exercise can be used for groups of 10 to 20 people. • With lesser people it becomes too simple, with more too complicated. • Strong hierarchal leadership structures might be an impediment for this exercise.
Time	45 – 90 minutes. The exercise itself takes about 30 - 45 minutes, but additional time is needed for reflection and closure to make the most out of it.
	PROCESS
Principle	One person, the Walker, stands up from their chair and moves to the opposite side of the room. This leaves an empty chair. The object of the exercise is for the Walker to move slowly (initially very slowly) towards the empty chair. The rest of the group,

	who are seated, must try to occupy the empty chair before the Walker. Of course, as soon as someone rises to sit on the empty chair, they leave behind them another empty chair. So the Walker moves towards this new destination. A sitter is constrained to stand and change chairs as soon as their posterior rises from their seat. The round ends when the Walker manages to sit.
Procedure	**Initial rounds** The initial rounds are played in silence. Invariably, the group begins in chaos. Within seconds of starting, up to half a dozen people are on their feet. The Walker has no difficulty in finding an available seat. When asked why they stood up people often say they don't really know, but they felt they had to do something. A sense of panic and confusion predominates. **Preliminary strategy with provisional leader** Eventually, between rounds I allow a certain amount of discussion. A preliminary strategy emerges, along with a provisional leader. The game is still played in silence, so the leader (often the one who complained most about the panic strewn earlier rounds) commonly adopts the practise of pointing at the people who should stand and move. Inevitably, the sheer complexity of the situation means the leader very soon loses control. **Theoretical strategy without a leader** At this point, there is often a move to dispense with a flesh and blood leader and replace them with a theoretical strategy. Normally this involves having the people farthest away from the empty chair race ahead of the Walker and take the seat. In practice this means one or two people are running the length of the room while everyone else looks on. The strategy works – until I make a middle seat empty or allow the Walker to increase their pace. The strategy collapses and no one is quite sure who's responsible for fixing it. **'Leaders'** By now the group is allowed to speak during the round. And so 'leaders' emerge who shout a variety of instructions. For awhile the group seems to be improving, until the handful of leaders begin to issue contradictory orders and the group grows frustrated and disillusioned. This is a key moment. It is a human truism that change is generally preceded by crisis. The practise of locating leadership in either one person or a small group (whether nominated or self-appointed) has been less than productive. Some of the group members are now angry, others frustrated, and inevitably a few feel bored. It's increasingly clear that trying harder is only going to produce more of the same. **Reflection** We pause for reflection. People express a range of emotive feelings. These feelings give some indication of how people cope (or not) with complex situations – especially in relationship to leadership issues. Some try to take charge – often leaving others feeling resentful. Some become experts at finding fault and blame. Others simply opt out. Eventually the issue of responsibility emerges. Who is responsible for creating success? Almost without hesitation, the answer comes back that the responsibility belongs to everyone.

Has this been reflected in their operating strategies? What would a situation of shared responsibility look like?
Some believe it will simply reproduce the initial chaos. Others argue that chaos represented a state of ignorance – they've learned since.

Leaderless leading
Silence is reintroduced. No strategies, no rules, no designated leaders. The Walker begins and somebody moves to the empty chair. The Walker turns and heads in a new direction. Somebody else recognises they are the best person to stand and go across. Each person strives to stay awake to the situation.
Nobody is bored. No one is busy thinking how silly or stupid they might look. The group is clear that it is not a question of roles – either as leader or follower – but the needs of the moment. Each moment calls forth a new leader to stand up, take the space, make their move and then sit down.
This is leaderless leading. The group can hardly believe what's happening. It's not perfect of course. Mistakes happen. But there's a deep desire to keep going, to practise. This is real learning. The group moves from worrying about results to enjoying the process. The Walker is no longer the enemy, but the teacher – the person who helps the group develop their capacity to respond.

Reflection

Questions that could be asked at the end of the exercise are:
- What happened during this exercise? (Introductory question).
- How did you experience it?
- What worked or did not work when you decided to follow a certain strategy? Why was this so?
- What worked or did not work when you decided to appoint a leader? Why was this so?
- What did you learn during the exercises in terms of making the walker walk? Was there any progress or was there no improvement after discussions?
- Do you need a strategy or a leader to make this exercise a success?
- What did you learn from this exercise in terms of the functioning of your team?

Discussion

Topics to discuss, depending on the objective of the exercise:
- Cooperation process during the exercise
- Leadership: the need for a leader and the role of such leader
- Strategies to achieve results in the group.

Closure

The fundamental requirement for true commitment is knowing that your contribution matters absolutely. Whether this means standing up or staying seated. Being trusted to do your bit.
For in the end, all leadership is based on trust. Without trust there's only power and control. The great mystery and often the grave mistake, is why we so often insist on placing our trust in someone other than ourselves.

Leadership can easily feel like a burden. If a passionate, committed, and collective sense of responsibility is our goal, The Empty Chair shows that we can't do it alone. Neither can it happen without us.

PRACTICALITIES

Room

- Large room with enough chairs for all participants.
- Chairs are randomly distributed throughout the room. The chairs face in various directions and use the full space provided.

Further reading

- IRC-FN: Asking Questions
- www.bpdws.org

Source

Joep Verhagen, with courtesy to Ken Caplan, from BPD (www.bpdws.org). June 2006

Date / Situation/ Facilitator/ Reflection/ Tips	**EXPERIENCES**
	These experiences are based on the Empty Chair Exercise, which was carried out during the RCD workshop on December 14 and 15 (Delft 2005), facilitated by Joep Verhagen (IRC): 1. The positioning of the chairs is very important to make sure that the exercise is sufficiently complicated but still remains do-able for the group. Placing the chairs in a circle with one chair in the centre will make it fairly simple to work out a strategy to keep the walker walking. On the other hand, isolating chairs makes is very difficult. 2. Give the group sufficient time to learn, work out strategies, and so on. Hurrying the exercise will make it very difficult for the group to come to a positive result. 3. Learning from this exercise will be strongest when the exercise and the objectives are not introduced at forehand. Ken Caplan started the exercise before even introducing himself. The discussion after the exercise is as important as the exercise itself. Be well prepared for this discussion: 4. It is not unlikely that the group will not manage to keep 'the walker walking' for a long time. Be prepared for this. In such cases, it is very useful that have participants who participated in an 'empty chair' exercise before and who managed to make 'the walker walking'. 5. Remain calm while facilitating the exercise and do not show your expectations about the outcome to the participants.

Title	# KNOWLEDGE EXPEDITION
Subtitle	***Addressing key sector topics in a mini learning alliance***

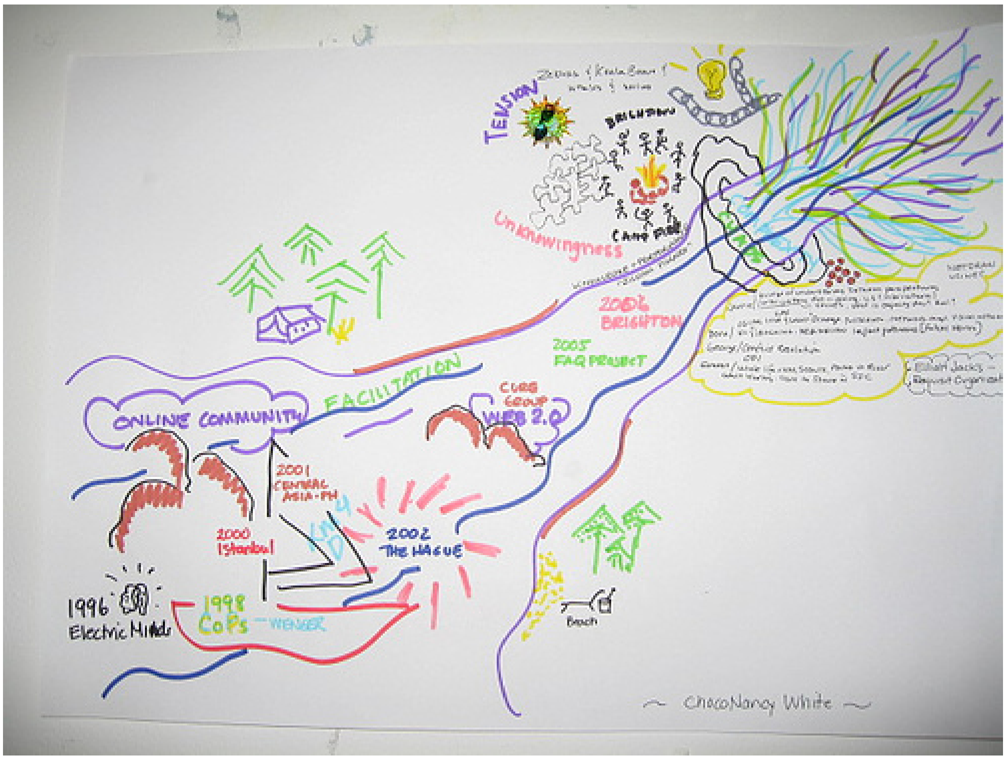
	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	Some key concepts need to be discussed for quite some time before we can make sense out of them. Knowledge expeditions are a good way to start these discussions using the energy of a team of peers and appropriate tools and techniques. Targeted at practitioners and theorists of a given field, not so much at newcomers.
	DESCRIPTION
Introduction	Long term (3-4 years) discussions on key concepts that most participants are struggling with.
Objectives	Generate new insights, fresh energy and a shared purpose around exploring a key concept of the field, for instance in the KM field, the topics mentioned were: glue, voices, wisdom, memory, change etc.
Output	Sheets with more refined questions, keywords and knowledge sharing approaches.
Topics	To be defined by the practitioners themselves. See example above.
	WHEN TO USE
Situation	Any time during an event, if the need to start these expeditions is felt. This is with the intention of carrying out the expedition way beyond the event and it requires further facilitation to get commitment, inputs, reflections etc.
Target group	In face-to-face, groups of 6 to 8 people can reflect together on the concept.
Time	Can take as much time as wanted since it goes beyond the event, but a minimum of 20 minutes comes at interesting outputs. Half an hour gives opportunity for a good grip. Reporting from each group takes an extra 5 minutes per group. So in total 1H sounds fair.
	PROCESS
Introduction	Introduce the method to interviewers and participants if they aren't familiar with it yet
Instruction	• [upstream, before event] A project or thematic group should develop a list of themes/topics and the key elements for each of them to start with. • Chair introduces the session on knowledge expeditions with the rationale. • Let groups (6-8 people) discuss and enrich the outline • Each group reports about their outcomes in brief. • Commitments to work further on these concepts can be done (preferably) on site or after the event. • All sheets are returned to the chair at the end.
Procedure	**5-10 min. Explanation** • Chair introduces the exercise, the rationale, and the sheets with topics on which each group will be working **20+ min. Group discussion** • The group discusses the concept by addressing the following (featured on each topic sheet): 1) (key) Questions around the topic 2) keywords 3) (Knowledge-sharing) approaches, as the idea is to work together on the topic **5 min. per group presentation of the outcome** • One person introduces the main questions, issues, changes to the sheet as developed during the discussion **5 min. Handing out all material** • Everybody hands out the sheet annotated with new issues and insights to the chair or the project/thematic group that started it.
Reflection	• How did you experience the procedure? • How does the metaphor of Knowledge Expedition resonate with you?

	• How do you respond to the idea of a 3-4 year enquiry, using mini learning alliances to mount Knowledge Expeditions on a particular theme? • Is this type of exercise useful to you as compared with other techniques? • Were the topics selected relevant or would you have included others? • What kind of questions would you ask to help shape the concept in more concrete terms? • What might you, as an individual, be interested in contributing to this work?
Closure	• After having presented all results, everybody hands out their sheet of paper. Potentially, a round of commitment rally can start to get people to work on it beyond the event.
	PRACTICALITIES
Handouts	The chair hands out the previously prepared sheets with topics, questions, keywords and approaches on various tables where groups are going to work.
Materials	N/A
Equipment	Pens to annotate the sheets. Could be organised with post its too.
Room	The room should be big enough to have various tables where groups can gather, discuss and jointly annotate the sheets.
Further reading	KM4DEV
Miscell.	
Source	Ewen Le Borgne, KM4DEV Brighton, July, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• July 2006, Brighton, KM4DEV workshop. 60 participants divided in groups of about 8, and follow-up after the event. • Tip: At the beginning of discussions, a round of personal experiences with the concept at stake helps tackling it.

Title	# KNOWLEDGE PICNIC
Subtitle	*So you think cognitive dimensions of KM should matter more than technology?* *Pass me the butter, would you?* ***Of the art of reflexive and relaxing lunches***

	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	The knowledge picnic is a way to carry discussions over lunch in yet an environment that ideally should be very relaxing and conducive to reflection. Is applicable when there is an option to wander around in the open with a good spot to stop and have lunch.
	DESCRIPTION
Introduction	Interesting conversations happen while walking and while eating.
Objectives	To interview participants on certain key topics over lunch, so as to collect more insights and interesting discussions, using a different environment and movement to put participants in a relaxed and reflexive frame of mind.
Output	• Interview tapes. • New questions and insights for other sessions of the event • Experience with the methodology.
Topics	To be defined in a series of questions that are handed to all interviewers.
	WHEN TO USE
Situation	• At lunch time, on a fair day, with a group that has a lot to share and discuss; • Ideally in the middle of an event, when reflection and concerns may be at their peak.
Target group	The whole event group, divided in (sub)groups of 5-6 persons + 1 interviewer.
Time	About 1.5 hours (can be longer, depending on availability of extra tapes and time taken for lunch) including walking there and back. Also 10-15 min. of instructions for interviewers to be briefed on the equipment.
	PROCESS
Introduction	Introduce the method to interviewers and participants if they aren't familiar with it yet
Instruction	• Ask for voluntary interviewers. • Brief interviewers on how to use the recording material, hand them the recording equipment and list of questions. • Form small groups of 4 – 6 people (already pre-arranged or using 1-2-3-4-1-2-3-4 etc. group counting) • Walk to the destination (ideally 10-15 min. walk to also reflect while walking) and bring the lunches (salads, sandwiches, ham, bread and cheese, water and juices will do); • Each interviewer starts asking the questions to either the group or any individual from it and records the whole conversation. • At the end of the picnic and of the questions, the group can set off back to the premises and interviewers hand out the tapes and equipment to the organiser. • A chair keeps time during the picnic to inform everybody when they're going to head back. • Once back, the tapes should be transferred into written documents for the record.
Procedure	• Prepare a list of 10-15 questions relevant to the event and test them to see if they are clear enough. **10-20 min. Briefing** • Explain interviewers what their job is. Let them go through the questions and ask for clarifications. Introduce the recording equipment with them and let them test, to make sure they do record afterwards without any problem. **5 min. Presentation**

	• Explanation of the exercise: everybody sticks together and discusses. **10-15 min. walking to the place** • Interviews can start any time from this point **1H. On site lunch** • Discussion. **10-15 min. Walking back from the place** • Any remaining question or interesting conversation can still unfold in that lapse. **10 min. Handing out all material** • Everybody hands out their tape and recording material and may test the tape to find out if it worked. • Whoever transcribes this into written is welcome.
Reflection	• How did you experience the procedure? • Was the changing environment and the walk any useful to collect interesting insights? • Was the atmosphere of the discussion different to other discussions held previously? • How did the interviewing go? Did you prefer to interview individually or in group?
Closure	• Everybody hands out their tape and recording material and may test the tape to find out if it worked.
	PRACTICALITIES
Handouts	Participants should receive the transcripts later on and certify that it reflects the discussion. All transcripts can be made available to all groups and integrated in the overall workshop proceedings.
Materials	The list of questions should be printed out for as many groups as necessary.
Equipment	Lists of questions, recording equipment (Dictaphone, recorder with microphone), headphones to test if it works, 2 tapes of 30 min. each minimum, food for lunch.
Room	There should be a retreat to walk to for 10-15 min. that is sheltered from wind and hopefully beautiful to provide a relaxing environment. Alternatively, the interview could take place throughout a walk but then the picnic part disappears.
Further reading	
Miscell.	
Source	Ewen Le Borgne, KM4DEV Brighton, July, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• July 2006, Brighton, KM4DEV workshop. 60 participants divided in small groups, facilitated by Carl Jackson. Experienced as one of the highlights of a generally rich conference. Excellent discussion inputs. • Tip: Group interviews may be more interesting than individual interviews and provide enough time to cover 10-15 questions. In the test mentioned above, it would have been impossible to interview each participant individually.


TENSION
BRIGHTON
CAMP FIRE
Unknowingness
2006
BRIGHTON
2005
FAQ PROJECT
FACILITATION
ONLINE COMMUNITY
CORE GROUP
WEB 2.0
2001
CENTRAL
ASIA-PH
2000
Istanbul
2002
THE HAGUE
1996
Electric Minds
1998
CoPs
WENGER
Beach
ChocoNancy White

Title	# LINE UP
Subtitle	***A format for documenting sessions, methods, exercises***

	SUMMARY
	This exercise is good for a group of 20 or more and takes 15 – 30 minutes. Use it for Team Building or just for Pure Fun! Use this activity to break the monotony of long periods of sitting and to help participants find out about each other. *Any group is game for this activity.*
	DESCRIPTION
Introduction	In the Line Up participants will have a chance to learn things about one another they may never think to ask. It is a group competition in which the groups will get instructions to line up in a particular way. Each group should get in a line as quickly as possible. When a group is lined up appropriately all group members should clap to indicate they have completed the task.
Objectives	• The Line Up is an ice breaker to energize the group and to get familiar with each other. • In addition to that it can also be used as the start of a session to introduce the topic.
Output	• Energy, fun, team building.
Topics	• Team work, leadership
	WHEN TO USE
Situation	• When some energy is needed to break the monotony of long periods of sitting. • When some informal atmosphere is needed between participants.
Target group	• For a competition at least two groups of 8 – 20 people is needed.
Time	• 15 – 30 minutes, depending on the time for reflection.
	GENERAL PROCEDURE
Introduction	Organize participants into groups of 8 to 20. Explain the exercise.
Practise	Conduct a practice round. Tell them to line up by height and to clap when they're finished.
Competition	• Do the competition with 2 or 3 rounds. • After each line up, determine which group clapped first and then announce them as the winner of the round.
Tip	Keep the tone light; this is a fun competition. Laugh and play with humorous comments from participants. Remember political correctness with regard to your own or participants' comments.
Ways to line up	1. Line up in order by shoe size. 2. Line up in order by length of arm's reach. 3. Line up in order alphabetically by favourite colour. 4. Line up in order by number of siblings you have. 5. Line up in order by hair colour, lightest to darkest. 6. Line up in order by age, youngest to oldest. 7. Line up in order by length of time with current employer. 8. Line up in order alphabetically by first name. 9. Line up in order alphabetically by last name. 10. Line up in order by number of pets owned. 11. Line up in order by hair length, longest to shortest. 12. Line up in order by the number of bones you've ever broken.
	VARIATION
	Use this activity periodically throughout a long session or you can ask groups to come up with their own way of letting you know they're ready. (For instance yell, hum a song, put up their hands, etc.)

	This can add a lot to the fun to the activity.
	VARIATION 'LEARNING ORGANISATION'
Introduction	Give the general instructions, but add that we will simulate global competition by a learning organisation.
1	• Do the first practice round.
2	• For the second round people are not allowed to talk. Now line up by shoe size.
3	• Tell them that the next line up will be in alphabetic order, but don't tell them yet in which way they will know the letters. • Groups have three minutes to discuss their strategy to do the line up without talking. • Everybody silent: Tell them to line up by favourite colour (for instance black …… white). GO!
Reflection	• How would you describe the strategy of your group to line up as quickly as possible? • What different strategies did you observe? Can we think of other strategies ? • How did your strategy work? What improvements would you want to make?
Tip	If the group is too big and/or the atmosphere is too chaotic and funny, then better leave the reflection out to keep it light.
Closure	A learning organisation is about reflection on experiences and about transforming these reflections into knowledge, which is relevant for the performance of the organisation. It requires certain competences, such as observation, dialogue and team learning.
Tip	Wait until people are seated and you have their attention, before doing the round off.
	VARIATION 'SORTING'
Introduction	With a smaller group, let the group line up as a whole. Explain that we will do some exercises to concentrate and get in the good mood.
Practise	Do a few rounds of line up, for instance length, age, and shoe size.
Sorting	Then let the group stand with their back against the wall. Draw a line through the middle or use a small rope. Now the group should sort themselves left or right of the line. Left is yes, right is no. Ask them some questions, such as: • Do you have clear expectations for today? • or goals? • Are you in the good mood? Ask some clarification
	PRACTICALITIES
Further reading	• Business FUNdamentals, Inc. : www.businessfundamentals.com
Source	Patrick Boel, with courtesy to Buro Bert den Boer (www.bbdb.info). June 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	

Title
OPEN SPACE TECHNOLOGY (OST)

Subtitle
An interactive, participatory method to work with large groups

SUMMARY

Typology/ Objective / Time/ Target group/ Situation

An introduction in Open Space Technology (OST) to get you started. OST requires very few advance elements. There must be a clear and compelling theme, an interested and committed group (25 up to 1000 people), time (2 hours up to several days), a place and a leader. OST can have a range of purposes, e.g.: problem and conflict solving, solution finding, strategy development, strategic planning and team building.

DESCRIPTION

Introduction

Open Space Technology requires very few advance elements. There must be a clear and compelling theme, an interested and committed group, time and a place, and a leader. Detailed advance agendas, plans, and materials are not only un-needed, they are usually counterproductive. While there are many additional things that can be learned about operating in Open Space, this will get you started. Some references to guidelines and experiences are provided at the end.
Note: experience shows that an Open Space event comes in all colours and shapes and depending on the level of experience of the 'facilitator' and the requirements of the initiating agency Open Space comes in a wide variety of forms.

Objectives

A technology that, based on trust in people, offers the space for creativity, commitment of self-organizing groups to develop, document and plan answers to the central theme of the Open Space event

Output

OST can be used for a range of purposes, e.g.: problem and conflict solving; solution finding; strategy development; strategic planning; team building.

Topics

WHEN TO USE

Situation

In any situation in which the initiating organization has trust in the invited participants creativity and commitment to contribute to a range of purposes, e.g.: problem and conflict solving; solution finding; strategy development; strategic planning; team building;

Target group

A group of – typically at least 10 and up to a thousand - people interested and committed to a clear and compelling theme. The bigger the group, the more experienced the "facilitator" should be.

Time

A creativity-generating-only Open Space event, depending on the complexity of the central theme and the total number of participants ideally lasts for one to two days. However meaningful Open Space events have been run anywhere between 2 hours to a full day. In case the Open Space should lead to documented planning and commitment the event is typically run in two cycles: a first creativity generating event of anywhere between a few hours to two days and a second consolidation and specification round resulting in documented action plans with responsibilities allocated.

PROCESS

Procedure

For a more detailed explanation see references mentioned at the end. Basic steps include:

Preparation

- The initiating agency together with the 'facilitator' invites participants well in advance (at least several days) informing them about purpose, clear and compelling central theme and in broad lines the methodology used;
- The 'facilitator' with eventual assistance prepares the venue and all required equipment, facilities and materials (in such a time that at the start of the event everything is well organized);

	Opening / market • The Open Space itself starts with a plenary session in which the 'facilitator' reminds participants of the central theme and outlines the basic principles and laws and practical rules guiding the Open Space event (10 – 20 minutes) • The 'facilitator' opens the space and indicates when the space will be closed (with or without several cycles); • A market of ideas and setting the agenda setting phase is facilitated by the 'facilitator', the participants take over and 'self-organize' themselves. The 'facilitator' makes sure that the space stays open and is conducive, solves problems where necessary (typically this phase takes between 30 minutes to 1 hour, depending on the size of the group and the number of sub-events proposed); **Creative phase** • The creative phase starts. Self-organizing groups run the show, including the documentation and display of outcomes. The Open Space may allow a series of Open Space sub-event cycles (typically 1 – 3) (one Open Space cycle typically takes 2 – 3 hours including time for documentation); • Pauses and lunch breaks are scheduled and held. They are typically used for documentation and informal exchanges among participants (time determined and announced in advance); **Closure** • The 'facilitator' announces the closure of the space and optionally allows for a short reflection in plenary. The 'facilitator' has ensured that documentation is available in hardcopy or digitally to all participants, preferably before participants leave the venue. Whether or not a follow-up consolidation and planning Open Space is held has been decided up-front (closure typically takes anywhere between 10 minutes and 1 hour).
Methods	**Four principles of Open Space** • Who ever comes is the right people; • Whenever it starts it starts, it's the right time; • Whatever happens is the right thing; • When it's over it's over **One law**: 'The law of the two feet' If you are neither contributing nor learning, move, explore and follow your instinct. Some people stick to one (series) (of) sub-event(s); others cross pollinate (so-called 'bumble bees') others like to listen in a more uncommitted way in various places (so-called 'butterflies').
Reflection	• *(Examples of questions, which can be raised afterwards for reflection.)*
Closure	• *(Examples of concluding remarks to wrap-up the session. In general they refer to the objective, the topics and the outcomes during the session.)*
	PRACTICALITIES
Handouts	• Invitation with information about purpose, clear and compelling central theme and in broad lines the methodology used.
Materials	• Up-front prepared Open Space ground rule posters (typically 4 – 5) • Poster paper, a set of markers (2-3 per sub-event)
Equipment	• Walls / pin-boards / flipcharts / for the market and setting the agenda • Optional: computer-cum-printer(s) cluster for documentation
Room	• Typically an Open Space event requires comfortable space for the whole group to come together (typically in a circle) for the 'opening the space' phase and for the 'holding the market and setting the agenda's' phase. Ample walls or pin-boards are required to hold the market and set the agenda of the event. Flexible

	set-up with movable light chairs for all participants; • Throughout the Open Space break away space should be available for typically 7 – 14 sub-events at anyone time, either within the central room or where possible a number of annex smaller rooms. • Ideally a separate dedicated documentation room: where outcomes of sub-events are documented on a cluster of computers and printed for display in the central room and distribution at the end of the Open Space event. • Pause/lunch facilities accessible through-out.
Further reading	• A wealth of OST experiences on http://www.openspaceworld.org/ . • The brief OST User's Guide has proven effective in getting most new leaders and groups off and running. • An immediate answer to an OST query on the OST list! • Pictures of OST events, including at IRC.
Miscell.	
Source	Peter Bury, IRC. March 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	Inexperienced OST 'facilitators' should invite an experienced one to assist or participate in a number of OST's first or follow a training. To find an experienced OST 'facilitator' visit http://www.openspaceworldmap.org/ .

Title	# PARTNERSHIP ANALYSIS
Subtitle	***A frame work to analyse the partnership of organisations***

	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	Instructions for an exercise (about 2 hours) to analysis with the two partners the various aspects of an existing partnership. The outcomes can be helpful for discussing the further development of the partnership
	DESCRIPTION
Introduction	Partnerships can have many forms and it is crucial to be as specific as possible about the type of partnership, expectations and obligations, shared values and visions, and responsibilities, to name a few.
Objectives	The objective of this exercise is to get a better insight in a present partnership.
Output	This provides an input for further discussions about the development of the partnership
Topics	Partnership development
	WHEN TO USE
Situation	When there is the intention to further develop the partnership relation and sufficient trust to talk openly about the various aspects of the relation.
Target group	• People with sufficient knowledge about the present state of the partnership. • In (sub)groups of 4 – 6 people
Time	About 2 hours, of which 30 – 45 minutes for the actual assignment.
	PROCESS
Frame work	For the analysis a framework will be used with five criteria 1. **Purpose / Spirit of the partnership** How do you see the purpose and spirit of the partnership? 2. **Performance: clarity & quality of deliverables (high – low)** How high/low is for you the clarity of what will be delivered? What do you think about the quality of the deliverables? 3. **Governance (decision making, management, accountability) / legal status.** How do you assess the governance of the partnership? What is the legal status of the partnership? 4. **Impact on identity of each partner** What is the impact of the partnership on how your organisation is perceived by others? 5. **Risk of 'investment' / Sense of obligation** What risks does your organisation take by 'investing' / participating in this partnership? How and to what extend does your organisation feel obliged to the partnership?
Subgroups	• Form subgroups. • Each subgroup decides who will do the reporting. Use the given format (see annex). Write the outcome on cards / post-its.
Assignment	• Analyse firstly the present situation of the partnership for the five criteria. • Indicate secondly issues for adjustment / change within the criteria. Given the objective of this exercise the focus should be on **identifying** issues for adjustment / change. As a next step there will be further discussion on the content and how of the adjustment / changes.
Plenary	Put the cards of each (sub) group in the frame work. Present the outcomes, with an emphasis on issues which need to be addressed in the review of the partnership.
Methods	•
Reflection	•
Closure	•

	PRACTICALITIES
Handouts	• IRC-FN: Partnership Analysis
Materials	• Brown paper, markers, post-its, cards.
Equipment	• Pin boards or 'sticky cloth'
Room	•
Further reading	• www.bpdws.org
Miscell.	
Source	Adapted from an exercise, which Ken Caplan from BPDWS (www.bpdws.org) has developed for a workshop with IRC in September 2005 about partnerships.
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	•

Annex: REPORTING OUTCOMES OF ANALYSIS PARTNERSHIP

Use this format to report the analysis of the partnership:

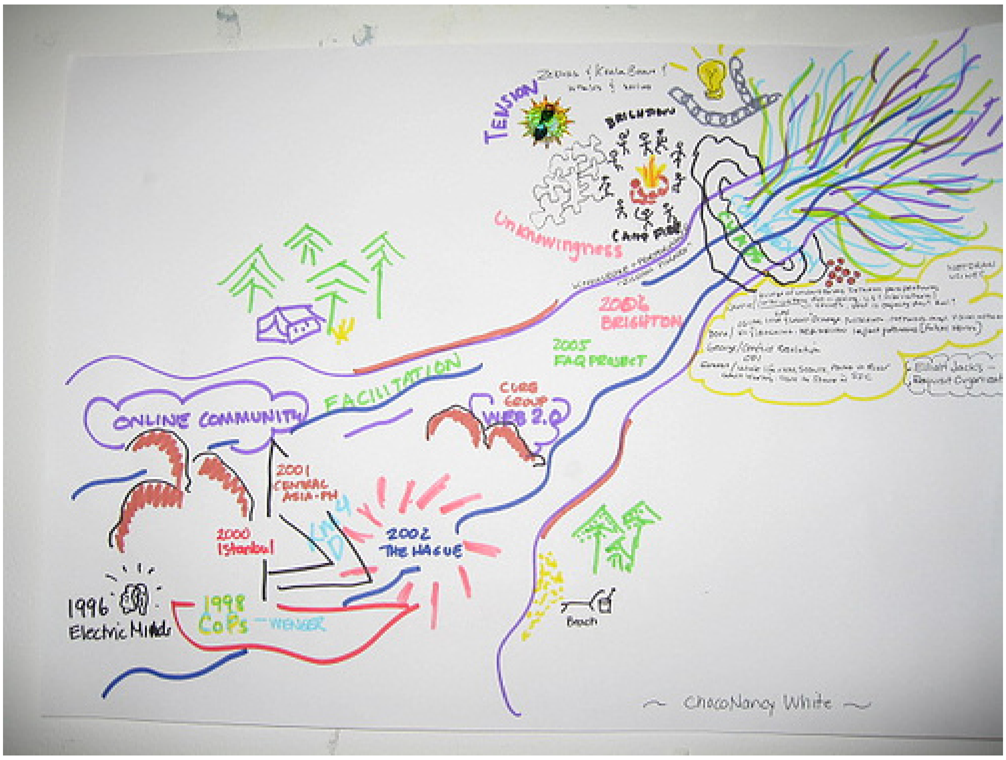
	Purpose / spirit	**Clarity / quality of deliverables (high – low)**	**Governance / legal status**	**Impact on identity & branding for partners**	**Risk of 'investment' / sense of obligation**
Present	•	• (specify, if appropriate, for different programmes and each partner)	•	• (specify for each partner)	• (specify for each partner)
Comments	•	•	•	•	•
Changes:	•	•	•	•	•
Comments	•	•	•	•	•

Title	**RIVER OF LIFE**
Subtitle	***A picturesque way of introducing oneself and sketching expectations***

	SUMMARY
Typology/ Objective / Time/ Target group/ Situation	A method (of about an hour) for introducing oneself in a descriptive and fun way and to sketch one's expectations (though they will not be reflected in plenary session). Particularly relevant for groups of people that do not know each other or their background.
	DESCRIPTION
Introduction	A drawing is worth 1000 words. Everybody understands drawings.
Objectives	To say a lot more about oneself to others than by expressing it in words; to reflect for oneself about one's own rationale and expectations re: the event attended.
Output	• Drawing of the River of life. • Experience with the methodology
Topics	Any question or issue that puzzles / bothers someone in the group.
	WHEN TO USE
Situation	• At the beginning of a workshop or event, when people should introduce themselves (not in plenary) and loosen up by using an innovative technique. • When the facilitator/trainer wants to make participants familiar with the method, which they can use in their work situation.
Target group	Whoever are there, are the right people; in (sub)groups of 4-6 persons.
Time	Twice 25 minutes for the method itself plus twice 5-10 minutes to introduce the two parts of the exercise.
	PROCESS
Introduction	Introduce the method if participants aren't familiar yet with it.
Instruction	• Form small groups of 4 – 6 people. • Ask each participant to draw a river flowing through the sheet, approximately at the 2/3 of the sheet. Ask them to represent on the bigger part (where they come from and) what led them to attend this event. • Then they all share and explain their drawing. • In a second part they draw, on the smaller part of the sheet, what they expect to gain out of the event and what they will use from it back in their normal work environment. • A chair keeps time during the drawing and explanations. S/he is the one to say when to start drawing, sharing, drawing again, sharing again and when to stop.
Procedure	**5 min. Presentation** • Explanation of the exercise, in particular first part (what led you to attend this event) and time given. **10-15 min. Drawing** • Everybody draws their own river of life. **10-15 min. Sharing** • Everybody explains his/her drawing. **5 min. Presentation** • Explanation of the exercise, in particular first part (what led you to attend this event) and time given. **10-15 min. Drawing** • Everybody draws their own river of life. **10-15 min. Sharing** • Everybody explains his/her drawing. **5 min. putting the posters on the wall**

Reflection	• How did you experience the procedure? • Did you find drawings useful?
Closure	• Everybody puts their posters on the wall and the whole group moves on to the next session
	PRACTICALITIES
Handouts	Participants can receive this facilitator note afterwards.
Materials	It helps to have the procedure with the timing on a chart, when giving the instructions.
Equipment	Large sheets of paper (A3), as many colour pen boxes as groups of 4-6, stickers with funny items, sticky tape or other material to fix drawings on the wall, digital camera to record these drawings.
Room	Should have large enough walls to accommodate all drawings.
Further reading	
Miscell.	
Source	Ewen Le Borgne, KM4DEV Brighton, July, 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	• July 2006, Brighton, KM4DEV workshop. 60 participants divided in small groups, facilitated by Carl Jackson. Excellent way to kick off a workshop that was excellent in spirit and contents from beginning to end. • Tip: Stickers and other funny items really make this even more interesting.

Example:



Title

ROLE PLAY

Subtitle

SUMMARY

Typology/ Objective / Time/ Target group/ Situation

A role play is an enacted representation of a real life situation, which can have different aims, depending on the situation, such as to practice interpersonal skills, to learn from experience or to experience the position and feelings evoked by performing various roles.

DESCRIPTION

Introduction

A role play is an enacted representation of a real life situation. They can play the role fitting to their own situation or the role of another person in a different position in daily life.

Objectives

A role play may have various objectives:

- to practice interpersonal skills
- to learn from experience in a ‘safe’ environment
- to experience the position or feelings evoked by performing various roles.

Output

New insights, which enable the participant to perform better in the real situation.

WHEN TO USE

Situation

Role plays are particularly useful to give insights into conflict and confrontational situations. Examples include:

- role plays of dealing with colleagues in your day-to-day working environment
- role plays around negotiation, for instance related to Integrated Water Resources Management
- role plays on the relation between community groups and government representatives
- role plays around gender roles

Role plays may not be appropriate in all contexts or for all situations. Some questions / requirements to check whether it is useful:

- Has trust developed within the group?
- Are participants familiar with role-play?
- Is the role-play the most appropriate way of dealing with the issue?
- You may be using it just because you enjoy it yourself?
- Are the objectives clear?

Target group

Have a maximum of 6 players to make the role playing not too complicated. The rest of the group gets other tasks like observer, helper and audience. If the group is not familiar with role play, then take ample time for the introduction to ensure that the group feels comfortable.

Time

The role play itself takes about 10 minutes, but sufficient time is needed for preparation and reflection. In total it will take at least 45 – 60 min. It needs to be noted that some role plays take much longer, up to 2 hours.

PROCESS

Procedure

Preparation of the role play

- Defining the objectives of the role play, and the modality (duration, number of players, size of group, number of observers)
- Developing the case, fitting the objectives
- Writing out the roles of the players, and the observers
-

Introduction

- Introduce the topic of the session, reasons to use a role-play, objectives

	• Discuss learning opportunities. • Talk about fears, feelings and how to handle them. • Explain criteria for success, good behaviour. **Dividing the roles** • Players, observers, moderators, summarisers, controllers, researchers, couriers, writers, supporter, etc. **Briefing roles** • Players: Informal/verbal/written out/in class/separately. Depending on the objectives participants can fill in their own role or task. • Observers: specific instructions to watch out for things relevant to the objectives of the session. **Instruction** • Use of props and equipment. • Preparation: role, tasks, room • Any special rules. • Time schedule **Preparation** • The players themselves can be asked to prepare the role play separately, or act and improvise on the spot • Similarly, the role players may need time to prepare themselves, e.g. making questions for observation, or observation sheets **Carrying out** • The role play itself • Observing of the play **Debriefing** • Invite *at first* the players to express their experiences, feelings, comments etc. • Ask observers to give their observations. • Ask the players to comment on the observations. • Encourage constructive criticism on the methodology and the play. • Make your own comments at the end.
Role facilitator	• The common task is observer and moderator. • The facilitator can also be a player, to demonstrate good practice. Make sure that you are still able to manage the situation when playing.
Reflection	• How did it work for you? • What did you learn from it? • What would you do differently in future?
Closure	Relate the outcomes to the objectives of the session.
	PRACTICALITIES
Handouts	Role descriptions, instruction, written material.
Materials	Props: tables, chairs, phone, etc. It might be part of the preparation by the participants to organise the necessary props.
Equipment	Equipment: flip charts, markers, video, etc.
Room	The participants organise the setting of the role play and the audience.
Further reading	• IRC-FN: Asking questions
Miscell.	
Source	Patrick Boel Mau 2006
	EXPERIENCES
Date / Situation/ Facilitator/	• Developing and facilitating a good role play is difficult and it takes often a few trial and errors to develop a good role play. Hence, it is advisable to test the role play

Reflection/ Tips	in a safe environment. • Because participants tend to miss / forget part of the briefing and instruction, it is helpful to have them on paper to hand out. • It is important that the key players start in the debriefing with their experiences. • When designing role plays around negotiation on water resources management, it can be useful to bring in some quantitative elements, e.g. including a fictitious budget, or amounts of water resources. This helps setting realistic boundaries in a negotiation process • Emphasise at the beginning, that even with serious objectives, role play still remains a game. Don't make it too 'heavy'. • Allocation of roles through the facilitator can help to 'confine' acting of those people that might easily become too dominant and to make things easier for those that have problems with 'playing'. • Try to avoid any embarrassment or a too exaggerated acting out of emotions. • Make sure that people take up roles different from their roles in reality. • Do not intervene in on-going play, if not absolutely necessary. • Roles can be a just a function/position or include a specific interest on the outcome, a piece of background on the role etc. • Roles must be familiar to the players, he/she should have met/interacted with the suggested type of a person before. • Often easier for people to slip into role if they are asked to give themselves a name, age and similar. • Typical problems of role plays can also be: - kick-off difficult at the beginning – interaction goes fully astray, people don't follow instructions any more – only two or three people play, the others keep silent/passive Think beforehand about what to do in this kind of cases.

Examples of Role Plays

Role play: local government in Integrated Water Resources Management

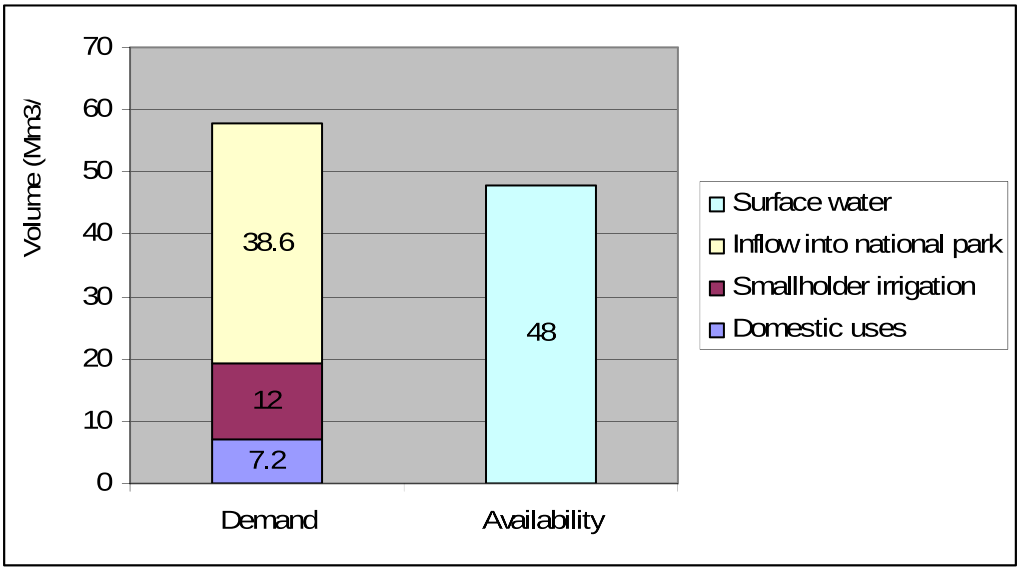
Context:
- This role play has been used in an awareness workshop about IWRM for local governments in Southern Africa. It can be used for similar audiences and workshops elsewhere.

Objectives:
- To make participants experience the different interests and practices of local government around integrated water resources management.
- To make participants experience some of the trade-offs that need to be dealt with in integrated water resources management

Procedure:
- This role play can be used in a workshop after key concepts of IWRM have been introduced so as to make people experience the practical implications of IWRM.
- The group is split into teams of around 7 people who deal with one of the cases explained below. Each sub-group is joined by a moderator.
- The sub-groups get time to read the case. The moderator provides the summary of the case.
- The members of the sub-group divide the different indicated roles among themselves.
- Carrying out the role play, the members of the group need to come to a consensus plan, as indicated in further detail in the explanation below.
- These plans are presented back to plenary. This still continues to be in a role play mode in the form of a public hearing. That means that some members of the audience get a specific observer status. They need to provide feed-back on the plan that is developed from the perspective of the assigned role. The observer roles can include:
    - Representative of Ministry of Water: feed-back on issues of water use efficiency
    - Environmental NGO representative: feed-back on environmental issues
    - Community member: feed-back on social implications for the community
    - Representative of Ministry of Local Government: feed-back on financial sustainability of the developed plan
    - Donor: feed-back from an international perspective
    - Other members of the audience can also invent roles and provide feed-back from their perspectives
- The public hearing will run for an hour, depending on the number of sub-groups.
- The public hearing serves to provide critical feed-back on the content of the work done.
- After the public hearing there will be half an hour for open discussion to reflect on the process of the role play. Guiding questions for that feed-back session include:
    - How did the consensus building within the sub-group go?
    - What new insights did you get out of the exercise?
    - What do these insights mean for your own work

Case 1: Crocodile Mountains District

The Crocodile Mountains District is crossed by the Blue River, a tributary of the Limpopo. The water demand and balance of the Blue River is as below.



- Domestic uses stand at 7.2 million m3/year. About 50% of the population has access to a basic amount of 25 l/p/day, and the remaining uses around 100 l/p/d. It must be noted that of this amount, about 4.0 million m3/year are provided for through groundwater.
- Smallholder irrigation stands at 12 Mm3/yr and is provided through several small schemes, at an efficiency of 50%.
- At the downstream part of the river is a national park. 38.6 Mm3/yr are required to flow into the park to maintain the ecosystems. It is expected that inflows below that amount will seriously affect wildlife and biodiversity.
- The average annual water availability from surface water is 48.0 Mm3/yr. In addition there is groundwater available, but there are no clear figures. Studies show that this may somewhere between 10-25 Mm3/yr. This is an addition to the surface water. Currently, only 4 Mm3/yr are used.

The district authority is faced by a number of issues:

- The domestic supply systems operate erratically. This means that even the basic demand of 25 lpcd can often not be met. People then have to scoop water from the river directly. Some people make unauthorized connections, leading to leakages and conflicts between communities. People even have gone to the streets to demand better services. The population is growing at 3%/year.
- According to flow measurements by the national park authority, less than the required amount is flowing into the park. They claim that the hippo population of the park is seriously, affected, as well as other species. These are the species, which attract visitors from within the country and abroad. The annual spending by tourists in the park is around, R50m, part of which flows back into the district. The park also offers employment to around 5000 people from the district.
- Apart from the park there are hardly any other employment options. The majority of the population is unemployed, depending on remittances and social grants, or engaged in subsistence farming (mainly rainfed). They demand job creation, or proper income from farming. Some groups are proposing to double the current amount of land being

irrigated to grow sugarcane. There is a concrete proposal for a system, requiring an investment of around R 20m.
- Although hard figures are lacking, many people have other livelihood activities, which are water dependent. There are some small dams for cattle, women make business out of cutting reeds, which grows on the edges of the blue river, and there are some small irrigated farms, using privately owned boreholes. Many of the cattle dams have silted, forcing cattle owners to resort to the water supply systems to water their cattle. This, supposedly, leads to break down of the taps.
- There is an annual budget of R20m for investments and rehabilitation of water supply. The budget for agriculture and local economic development is R15m/year.

A meeting has been called, with the following persons:
1. the mayor; his main responsibility is providing overall strategy for the district
2. one of the elected councilors, who chairs the committee on poverty alleviation
3. the agricultural officer, whose responsibility it is to promote agricultural and livestock development in the district
4. the local economic development officer, whose responsibility it is to develop strategies to promote economic growth and development, and job creation
5. the chief engineer, responsible for infrastructural development, including water and sanitation
6. the environmental officer, responsible for managing nature areas in the district, but also for pollution control
7. the financial manager, responsible for the district's budget, and long term financial sustainability. This is a key issue, as the district has a tradition of overspending.

The mayor is keen to use water as a motor for sustainable development and growth in the district. The group is tasked to discuss how that can be put into operation. As a group you need to come to an official statement, with the overall strategy for the district on water for development and growth, with a number of action points.

Case 2: Limpopo City

Limpopo City is a city of 1 million inhabitants, located on the bank of the Limpopo River. About 70% of the city is connected to the water supply system. The other 30% get their water from different sources, such as directly from the rivers, different wells and privately owned boreholes and water vendors. As these people are mainly located in the slums, the city council is struggling to service them, even though they demand it. The people who are serviced consume around 125 lpcd. The total daily intake of water into the system is 175.000 m3/day. Around 140.000 m3/day of wastewater is produced, ending up in 2 of the city's wastewater plants, and being disposed back into the river after treatment. Due to frequent power cuts, the plants operate irregularly and treatment is not effective. Downstream municipalities are lodging complaints that they "receive all the dirt from Limpopo City". They are demanding R120m in damages from Limpopo City. The Catchment Authority is looking into this case.

One of the main slums of Limpopo City is located close to the outfall of the treatment plant, and report high levels of diarrhea. Many of the slum dwellers have small plots of land on the banks of the river. These plots are irrigated with watering cans from the river, or are dryland plots. In winter, they struggle to get water, as the river runs very low then. The slum dwellers are also affected by floods in summer. The Municipality officially does not allow the slums so close to the river, as it is aware of the flood risks, but there are no other places available. The city is growing rapidly anyway, and housing development is a headache for town council: there is money for housing, but hardly any suitable land. No thoughts have been given on how to expand services to new housing development areas.

The Municipal utility company spends on an annual basis R400m to run the water supply service. Another R200m is spent on the wastewater treatment plant, in terms of its operation and maintenance costs and administration. Only R250m are recovered from customers. It has also a budget of R100m/year to develop new water services, but that is used to fill the gap between income from users and expenses on water supply and wastewater treatment.

The remainder of the gap between income and expenses on water supply and wastewater has sparked a financial crisis in the Municipality. And the possibility of having to pay damages to downstream municipalities may even aggravate the situation. An emergency meeting has been called with the following persons:

1. the mayor, responsible for the overall strategy and operation of the City
2. the financial manager, responsible for the district's budget, and long term financial sustainability.
3. a councilor, whose constituency is in the slum area
4. the city planner, whose responsibility includes spatial planning and city development
5. the water and sanitation officer, responsible for water and sewerage services provision
6. the housing officer, responsible for new housing developments
7. the environment officer, responsible for waste management and pollution control

The group is asked to develop next year's annual plan, in which service delivery, especially water, sanitation and housing are to be put central, but within a sound financial framework. The group is tasked to operationalise this plan. Discuss these into an official statement, which needs to be presented in a public hearing.

Title

THE WORLD CAFÉ

Subtitle

An participatory method to let (large) groups interact creatively

SUMMARY

Typology/ Objective / Time/ Target group/ Situation

The World Café method is based on the experience that people interact in more meaningful ways in a relatively informal relaxed and unthreatening environment. That is why the method's name refers café's, where people meet at a table or a bar and have creative conversations and eventually take some notes on the (paper) table cloth about interesting ideas.
Organizing a world café requires some upfront preparation. It lets (large) groups interact and have creative conversations (i.e. exchange of ideas) over a relatively short time in different constellations about a clearly defined set of interrelated issues. A clear and compelling theme is formulated up-front into a series interrelated discussion topics / questions (typically 3) and an interested and committed group is invited (minimum 12 participants, maximum not defined).
The minimum time required is typically between 45 minutes and 1,5 hour. Its facilitation requires an experienced and firm facilitator.
Typical application situations include: identification of problems and solutions ; pre-planning creative ideas development ; strategy development ; developing team spirit and commitment ; promoting authentic exchange between people.

DESCRIPTION

Introduction

Think about what if…

1. The future is born in webs of human conversation?
2. Compelling questions encourage collective learning?
3. Networks are the underlying pattern of living systems?
4. Human systems—organizations, families, communities—are living systems?
5. Intelligence emerges as the system connects to itself in diverse and creative ways?
6. Collectively, we have access to all the wisdom and resources we need?

The key to creating a successful World Café conversation is employing the seven guiding principles, which *when used in combination* foster courageous conversations and collective intelligence.

1. Clarify the Context
2. Create Hospitable Space
3. Explore Questions That Matter
4. Connect Diverse Perspectives
5. Encourage Each Person's Contribution
6. Listen Together for Patterns, Insights and Deeper Questions

Objectives

To put a group of people interested in a specific topic at ease in a comfortable and relaxed atmosphere, which allows them to interact creatively and address the issue at hand in a constructive way.

Output

In its original form the World Café is primarily meant to facilitate creative conversations among groups of people interested in a particular issue. The method assumes that each individual takes up her/his responsibility to decide on how to use the outcome of the event or the interaction with others.

Optionally the facilitator may ask the participants if they (or some individuals) would

	like to document the output (e.g. whatever is documented on the tablecloths) in a way that it can be made available to all participants after the event. Similarly another 'output' (rather outcome) could be that some participants decide to organize themselves for some kind of follow up of the event.
Topics	-
	WHEN TO USE
Situation	**The World Café process is useful when:** 1. You want to generate input, share knowledge, stimulate innovative thinking, and explore action possibilities around real life issues and questions; 2. To engage people - whether they are meeting for the first time, or are in established relationships - in a real conversation; 3. To conduct in-depth exploration of key strategic challenges or opportunities; 4. To deepen relationships and mutual ownership of outcomes in an existing group; 5. To create meaningful interaction between a speaker and the audience; 6. To engage groups larger than 12 (we've had up to 1200) in an authentic dialogue process. **The Café is less useful when:** 1. You are driving toward an already determined solution or answer; 2. You want to convey only one-way information; 3. You are making detailed implementation plans; 4. You have fewer than 12 people (better to use a more traditional dialogue circle, council or other approach for fostering authentic conversation).
Target group	Any group of people interested in a specific issue. A World Café should bring together at least 12 participants, it has been organized for groups exceeding 1.000 participants.
Time	Including introduction, 3 rounds of 10 minute conversations and presentations of the conversations in plenary a minimum of 45 minutes is required. To allow for more in depth discussion one should calculate up to 20 minutes per conversation round. With larger groups (more than 50) the whole event should be given more time.
	PROCESS
Procedure	For a more detailed explanation see references mentioned at the end. Basic steps include: • Participants are invited to the World Café, explaining in general terms the purpose and central issue or theme of the event, but not the conversation questions (see below). If the World Café is organized within a larger event, it doesn't have to be announced in advance at all; • Up front formulation of 3 interrelated conversation questions that address key aspects of the issue for which the participants come together. Ideally there is a logical sequence of the 3 questions, i.e. the questions some how encourage deepening the conversations around the central issue; A typical sequence of questions could consist of: 1. A question asking participants to discuss how they see or **understand** the topic at hand; 2. A second question asking participants to inventorize what are the **main or priority aspects** of the topic to address; 3. A final questions asking participants to formulate ideas about **how to**

address (solutions) the topic at hand.

- Before the event the room is prepared with loosely arranged café tables, chairs, etc. (see practicalities);
- At the event the facilitator introduces the general topic and the procedure;
- The facilitator identifies 'hosts', one for each table, who have the assignment to facilitate the conversation at the table and its documentation on the table cloth (in principle in a totally free way: words, graphics, drawings, etc…);
- The event typically consists of 3 rounds of conversations. Throughout the event the 'host' remains at the assigned table, all other participants may move freely to any other table in between the 3 conversation rounds;
- The facilitator presents and introduces briefly the first question;
- 'hosts' facilitate the conversations at the tables;
- The facilitator indicates when a conversation round has come to an end;
- People move to other tables;
- Facilitator introduces round two with question two;
- 'hosts' briefly summarize to new guests at the table what happened in the previous round. So the new guests are encourage to build upon the conversation and documentation at that table in the previous round;
- At the end of the 3 rounds of conversations, all participants reconvene in plenary and the 'hosts' (if needed assisted by volunteers) present in broad lines the main outcomes of the table conversations with the help of the displayed table cloths;
- The facilitator ends the event following suggestions below regarding reflection and closure.

Methods

- The method is explained in the procedure above;
- The main role of the facilitator is to explain the event, its purpose and procedure clearly and concisely and to ensure an nice atmosphere;
- Option: the facilitator may create the café atmosphere further by putting a few decorations on the tables, e.g. flowers, some sweets, have drinks available on side tables, etc.

Reflection

At the end of the event the facilitator could ask a few questions, similar to the ones below to have the group reflect on the method and the outcomes:

- How did you feel about meeting and discussing at the various tables;
- How do you compare this kind of conversations with other types of meetings you are used to?
- What do you feel about the outcomes and the usefulness of your discussions for your own follow-up of this event?

Closure

The facilitator could close the event as follows:

- Agree with the group whether or not they feel the outputs of the conversations at the various tables (i.e. the 'table cloth' posters produced) should be documented and distributed to all participants. Also agree if so, in which form this should be done and by whom;
- Check with the group if some people would be interested to explicitly follow up this event with concrete activities, and if so how and when.

PRACTICALITIES

Handouts

- In principle the World Café method does not provide handouts;
- However participants may be interested in knowing where to find reference material on the method (e.g. the world café website mentioned in the references);
- The group may agree to document the outcomes of the event (see closure

	above)
Materials	• On each table (see under equipment) a big paper table cloth (if you have small flipchart sheets, tape a few together); • On each table a set of 3 – 4 colors big markers (typically: black, blue, red and green); • Optional: tape or another way of eventually display the "table cloths" on a wall or (pin)board.
Equipment	• In function of the above point the required number of tables (preferable round or square) and chairs; • A big display (e.g. computer projector and screen) visible to all to display the conversation round question.
Room	• A spacious room that allows all participants to sit comfortably at one of the café tables (depending on the total number of participants, calculate between 5 and max. 10 participants per table); • Alternatively – but this is not ideal because moving from one round to the next will take more time and the facilitator loses oversight – tables could be placed in several adjacent rooms; • Of course if weather permits, the whole event could take place in the open air.
Further reading	• http://www.theworldcafe.com/ • The community of World Café users can be joined here http://www.theworldcafecommunity.net/ • A quick reference guide (.pdf file) can be downloaded here http://www.theworldcafe.com/cafetogo.pdf • Pictures at http://www.flickr.com/photos/bury_irc/tags/theworldcaf%C3%A9/ , many more can be found on www.flickr.com using the tag theworldcafé.
Miscell.	
Source	Peter Bury, IRC. August 2006
	EXPERIENCES
Date / Situation/ Facilitator/ Reflection/ Tips	Inexperienced World Café facilitators should contact or better involve an experienced one to assist in preparing and conducting the first one (contact IRC or use references indicated above. Several IRC staff have experiences with this method in the context of IRC a learning organization events and programmes like SWITCH and RCD 18 countries.