Facilitator

2021 - 2022

Table of Contents

About PTA

VISION Every child's potential is a reality.

MISSION To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PURPOSES
- To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- To promote the collaboration and engagement of families and educators in the education of children and youth;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

VALUES
- **Collaboration**: We will work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.
- **Diversity:** We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward the achievement of our association's strategic initiatives.

PTA NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS
- Standard 1: **Welcoming All Families into the School Community** Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.
- Standard 2: **Communicating Effectively** Families and school staff engage in regular, two-way, meaningful communication about student learning.
- Standard 3 **Supporting Student Success** Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.
- Standard 4: **Speaking Up for Every Child** Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.
- Standard 5: **Sharing Power** Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.
- Standard 6: **Collaborating with Community** Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.

The Role of a Facilitator
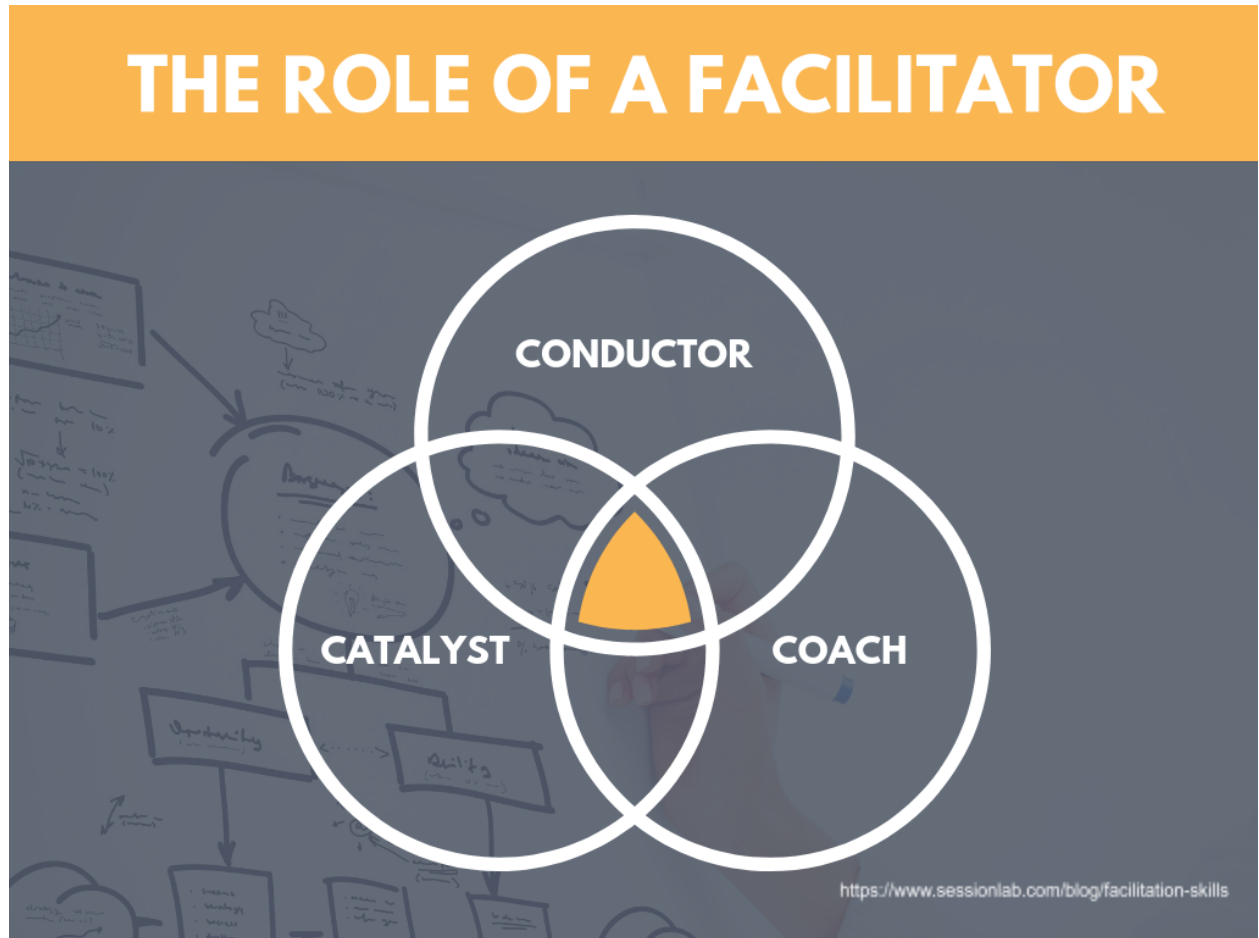
If we really want to understand the different angles of the facilitator's role, then the following similes may help. A facilitator can be perceived as:

- A 'catalyst' for discussion: They make possible the transformation of input (ideas, opinions) to desired outcome (refined ideas, decisions, strategies, etc.) without being an active part of the conversation themselves.
- A 'conductor' of an orchestra: A facilitator synchronizes all the musicians (group participants), optimally guiding the use of their instruments toward the desired result – a harmonic musical expression of the musicians' complex interactions, creativity, and expertise. As the "conductor" guides the participants, a system is organically created wherein the facilitator helps every individual comply with the agreed-upon rules and norms to be followed. In this way, their efforts enable each person in the "orchestra" to create something greater than themselves.
- A 'coach': A facilitator helps the group form a constructive way of working together, identify its needs and wishes, and reach the outcome they would jointly like to achieve.

The Power of Mission and Purpose

Wise Words on Leadership

The art of leadership is getting others to do what you want done because they want to do it.
-Dwight D. Eisenhower

Every organization is perfectly aligned to achieve the results it gets.
-Dr. Stephen R. Covey

Only 360 degree leaders influence people at every level of the organization.
-John Maxwell

A Clear and Compelling Purpose
- Is a Mind-Set
  - The PTA Mission is our mind-set. It is our purpose.
  - Making every child's potential a reality by engaging and empowering families and communities to advocate for all children
  - Every child. One voice.
- The way we look at things
  - Our frame of reference
  - Guides decision-making.
- Motivates us to
  - Come to the PTA table
  - Go into schools
  - Work tirelessly
- Leads to alignment
  - We look at things through the same lens
    - With our individual perspectives
  - We are motivated to achieve the mission
    - Rather than individual agendas
  - We give our best efforts
  - We don't just show up. We make a positive difference.
- Leads to higher engagement and achievement
  - If there is a clear and compelling purpose, people will give their best, their highest efforts because they want to
    - There is no commYOUnity without you
    - back the future

Use Mission and Purpose
- Use the mission often and with intention
- Don't assume everyone knows it. Make sure they do!
- Begin every meeting, every event by focusing on it
- Use mission and purpose strategically
  - When communicating
  - In decision-making
  - In conflict resolution
- To form a united team
  - Our mind-set

> **True leaders always practice the three R's:** *Respect* **for self,** *Respect* **for others,** *Responsibility* **for all their actions.**

- ○ Our frame of reference
- ○ Guides decision-making

Connecting to the Mission Elevates
- ● People want to contribute and know that their contributions matter
    - ○ Working to accomplish the PTA mission is important in the lives of children, families, and the community
- ● People want to be connected to something bigger than they are
    - ○ Our members are part of their local PTA.
- ● Demonstrate Connections
    - ○ Our members are part of their local PTA, Texas PTA, and National PTA.

Our Mission is Worthy
- ● Every child. One voice.
- ● Our mission realized makes the world a better place for everyone.
- ● *"Everyone's happier when everyone's happy." - Eleanor Roosevelt*

Facilitator Preparation

Preparation is key no matter what your next task, project, or decision may be. John Wooden reminds us that "Failing to prepare is preparing to fail".

For facilitation, it is especially important for you to be personally prepared, as your participants are looking to you to guide them through a group activity. The experience that you and your participants have will be determined by how well you prepare.

Below are areas of preparation and related checklist of items you will want to consider in conducting a successful and meaningful facilitation.

> **Leadership is *unlocking* people's <u>potential</u> to become better.**
> **-Bill Bradley**

Agenda Prep

Create an agenda/outline for your workshop.
- Include a good balance of different types of activities: group activities, individual reflection.
- Include time for practical sessions, breaks and energizers.
- If possible, get a sense of the make-up of your audience ahead of time. This will help with context of questions and activities you will engage in.
- Have list of questions, or discussion starters and follow up questions
- Have topic related **short** stories/examples ready to get the discussion going (continuing). Personal stories are usually well-received.
- Create a timeline for each item on your agenda to ensure you stay on task.

Logistics Prep
- Have you thought through how you're going to carry out the activities?
- Have you decided on the venue, seating, refreshments, incentives, etc?
- Do you have all the materials you need?
- Have you checked whether anyone has particular needs, and how you will meet those needs?
- Request equipment needed or arrangement of seating ahead of time. Be prepared for technology failures. Know who to contact to fix your technology issue.
- Determine how you would facilitate your workshop without a computer or microphone.

Speaking Prep
- Have a solid opening and closing
  - Opening – welcome, housekeeping (i.e. restrooms, flow of session, etc.), objectives, and establish ground rules (i.e. allowing everyone to participate, asking questions, side conversations, disagree politely)
  - Closing – thank you, what to expect going forward (i.e. sharing of minutes/notes, next class recommendation, assignments)
- Dress professionally. Wear comfortable shoes. If you feel good you look good, you will also feel more confident.
- Bring a printed copy of your agenda/session notes.
- Practice ending a minute or so earlier than the time you have allowed. That will give you an extra safety margin.
- Have a way of keeping track of time (timer, volunteer, etc.), so you cover all agenda items within your allocated time.
- Be very familiar with your visuals and any exercises.
- Be flexible - Be prepared to step in with "energizers" when the energy in the room drops. This may require managing the discussion in a different way (i.e. walk around parking spaces, splitting the group into smaller groups with a discussion assignment). Group size is important when considering utilizing an "energizer". Sometimes passing out candy or similar small tokens to those participating will keep the attendees alert and engaged.

- Have strategies ready to redirect the discussion if need be (i.e. attendee dominating the discussion, becomes disruptive, veers off track of topic)
- PRACTICE! PRACTICE! PRACTICE! Practice with family/friends or record it to review later. Evaluate areas that need work and then work on improving them before the actual workshop.

Day/Evening of Workshop
- Arrive early and test out all equipment (i.e. clicker, microphone, computer, access to the internet if needed, sound through computer if needed). Know who to contact to fix your technology issue.
- Have water and mints available for yourself and tend to any other personal needs 10-15 minutes prior to the start of your session.
- Turn your cell phone to silent/do not disturb. If using your phone as a timer, make sure you can still hear the alert, if it's on silent mode.
- Greet attendees as they arrive. Make sure they have all the materials.
- Keep the discussion constructive and positive.
- It's okay to be nervous. Take a deep breath, exhale and go for it!

You may also find using a Facilitator Preparation worksheet helpful in preparing for your workshop. See a sample worksheet on the next page.

Sample Facilitator Preparation Worksheet

Facilitator Preparation Worksheet	
Facilitator Name:	
Topic:	
Date of Session:	
Approximate number of attendees:	
Objectives:	What do you want attendees to take away from this session?
Application:	Examples of how attendees will use this material in their PTA work:
Handouts/Takeaway Tools:	
Icebreakers/Activities:	
Facilitator Preparation:	To prepare for the session: ● Review the Facilitator's Guide, slides, handouts ● Think about personal experiences that relate to the session ● Review the participant list ● Make enough copies of handouts/tools for each participant
Room Preparation:	● Ensure the room is configured to maximize participation and discussion ● Anticipate and manage potential distractions like noise, room temperature, sufficient seating, etc.
During the Session:	● Set (or review) session "norms" ● Share objectives for the session ● If time permits, include an opening icebreaker Encourage discussion ● Refer to the Facilitator's Guide to manage disruptive participants ● If time permits, include an interactive activity ● Keep track of time (consider assigning a timekeeper) ● At the conclusion of the session, review objectives ● Provide an opportunity for post-session feedback

Building Rapport

You've heard it before: PTA is about relationships. When we make connections with our fellow PTA leaders, they feel comfortable sharing ideas and concerns.

Build rapport with your group by showing genuine interest in them. Some leaders like to "work the room" before an event begins, chatting briefly with participants. Others prefer to have general conversations with the crowd. Be sure to share a bit about yourself as well.

Be curious, listen, and keep it light. Use humor if you are comfortable doing so, but never at another person's expense.

We all have PTA in common, so that is a good place to start the conversation. But feel free to bring in other topics as well.

Mostly, just be yourself and show that you care! Building rapport will help you to build long-term relationships that will benefit everyone.
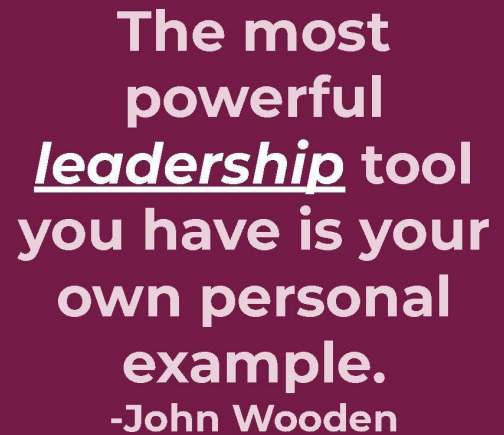
> The most powerful _leadership_ tool you have is your own personal example.
> -John Wooden

AGREE ON GROUP NORMS

Once you have gotten to know one another, it is a good time to agree as a group on norms -- expectations and ground rules -- for the meeting. This gives everyone in the group buy-in to work together in a positive and effective way. Keep the list short and clear so the expectations are easy to remember and fulfill.

Some examples may include:

Honor the time agreements
Stay on topic and on task
One conversation at a time (no side conversations)
Share ideas and thoughts freely, honestly, and kindly
Listen respectfully and with an open mind
Pursue consensus

The group leader can provide a list of group norms and let the group members customize it, or let the group create the list. It is important for the group to have input and agreement so they will have ownership of the expectations.

Drawing Boundaries

Drawing boundaries is important so people can work shoulder to shoulder and not get into head butting. The main thing will be the facilitator's boundary - they are the impartial person in the room and need to remember their role at all times. The minute they become "part of the group" their credibility as a facilitator is lost.

- Setting expectations with participants - lead by example (input from participants)
    - use Robert's Rules of Order
    - how will questions be asked/answered (raised hands, written out, etc.)
    - respect for others and others' ideas, listening skills, no judgement of ideas
    - facilitator is neutral
    - respect time - how do you adjust if things are going off track: have a plan
    - who/how will results be kept or recorded
    - breaks - RR etc; specific times or take as needed
- Managing the audience; power people, etc.
    - remind them of the agreed upon agenda and ground rules;
    - watch your own words and body language - stay in facilitator mode NOT decision maker; don't be defensive;
    - give the power people a role to play
    - let the group decide if it is time to move on
    - be honest about being pulled off your agenda or being intimidated
    - accept or legitimize their point
    - use humor
    - take a break
    - confront them about their behavior in the group, never individually, it is about the group being able to move on not the facilitator
    - It is not personal
    - acknowledge differences in values
- Setting ground rules
    - A sample can be provided, but the group is more readily accepted if the group creates them together. should have an opportunity to provide input. Once the ground rules are created, a voice of approval from everyone is significant.
        - We could use the ground rules from our executive board meetings as an example
        - Sample Ground Rules:
            1. Show up on time and come prepared
            2. Stay mentally and physically present
            3. Contribute to meeting goals
            4. Let everyone participate
            5. Listen with an open mind
            6. Think before speaking
            7. Stay on point and on time
            8. Attack the problem not the person
            9. Close decisions and follow up
            10. Record outcomes and share
- Keys to Effective Discussion
    - The Four R's: Recognize, Request, Repeat, Review
    - Prevent idea-busting by acknowledging and validating all ideas and perspectives
    - Avoid the trap of editing people's words. Paraphrase but don't wordsmith someone's comments.

Great leaders don't _tell_ you what to do. They _show_ you how it's done.

Raise Effectiveness by Evaluating Meetings

You've just finished facilitating a meeting or training session. "Wow!" Whether that sentiment is positive or negative involves more than the planning that went into preparing for the meeting and more than the meeting itself. It also involves analyzing what actually happened so you can continue to do a better job as a facilitator and keep from repeating mistakes.

There are specific ways to reflect upon and analyze meetings. Terms often used for this process are "after action review," and "meeting evaluation." Both involve looking at what was intended – that is, what was planned – and what actually happened. Both can be done individually by the facilitator or they may involve specific team members or team members and participants. Every meeting is a process and evaluation completes the process. As you begin to develop facilitation skills, you may find it useful to self-critique before you include other team members and participants. This can be beneficial in helping develop baseline skills that will help you lead more effectively.

Following are two examples that can be used in analyzing a meeting or training session. Each improves future outcomes by:
- Focusing on why things happened
- Comparing intended results with what was actually accomplished
- Encouraging participation
- Emphasizing trust and the value of feedback

Thematic Evaluation
Discussion questions typically center around three themes.
- What was supposed to happen? What happened? Why was there a difference?
- What worked? What didn't work? Why?
- What would you do differently next time?

When you include team members or participants, remember to ask open-ended questions, so they don't think there are "right" or "wrong" answers.
- What would you have preferred to happen?
- What would you do differently next time?
- How could the situation have been prevented?
- In your opinion, what is the ideal procedure?

Analytical Evaluation
To be effective, when self-critiquing or working with team members and participants, you can use the basic themes listed above or you can delve deeper by analyzing meeting results, meeting process, participation/tone, and next steps.

Meeting Results
- What was the purpose of the meeting?
- Was the purpose met and to what extent? (fully, somewhat, or not at all)
- Were planned decisions made as required and expected?
- If decisions were not made as expected, why not?
- Based on the results of the meeting, was the meeting necessary and worthwhile?

Meeting Process
- Did the meeting start and end on time?
- Was the meeting held at the right time and in the right place?
- Was the right format used? In-person meeting, phone conference, video conference
- Were there any technical or logistical problems?
- Did all or most invitees attend?
- If attendance was not as expected, what was the cause?

True leaders don't create *followers*, they create more *leaders*.

12

- Were the presentation materials properly prepared and distributed before the meeting?
- Did the quality or quantity of presentation materials enhance or diminish overall meeting success?
- Was sufficient time allowed for the meeting?
- Was the meeting too long or too short?

Participation and Tone
- Were all agenda items covered?
- Were you satisfied with the quality and quantity of meeting participation?
- Were participation roles and responsibilities communicated and clarified prior to the start of the meeting?
- Was the discussion properly controlled and managed?
- Were certain participants allowed to dominate the discussion to the detriment of others?
- Did the meeting have a positive or negative tone?
- If the meeting tone was negative, how could that have been avoided?
- Did the meeting tone have a negative or positive impact on overall meeting success?

Next Steps
- What next steps and action items were identified and assigned at this meeting?
- Were these steps and assignments appropriate considering the original purpose of the meeting?
- Did participants leave the meeting with a clear understanding of the next steps?
- What procedures will be followed to ensure that assignments and next steps are properly executed and completed.

Conclusion
Evaluation plays a key role in the process of continuous improvement. It helps us analyze what is going well and what needs improving so we continue to grow and develop our facilitation skills. Sometimes Thematic Evaluation works well, and sometimes Analytic Evaluation works well. If neither seems to be exactly right, consider combining elements from each to get the information that you and your team need to be as effective as possible. For example, if using Thematic Evaluation has worked quite well but people are coming to meetings unprepared, you might want to include questions from Next Steps in the Analytic Evaluation model. Meetings and training sessions are conducted to achieve results. Evaluating often and well helps ensure that these results are achieved.

Activities

Great icebreakers/activities have the power to strengthen bonds, stimulate brainstorming, and to create a more open atmosphere. Activities don't have to be used just for starting a session, ending a session, or taking a brain break. They can enhance the content within the meeting and expand on concepts in a fun way. Online resources for these types of engagements are plentiful. Session Lab is a great place to start. Each of these described below are from https://www.sessionlab.com/blog/icebreaker-games unless otherwise noted.

GET TO KNOW EACH OTHER

Just One Lie

This method is an adaptation of the well-known icebreaker 'Two Truths And A Lie' to create an activity that can be run throughout a day of meetings or workshops. Participants mingle and ask questions from each other while noting the answers on post-its. But everyone includes one lie. The result is that you have a board of interesting facts about all the participants, among them, one lie. Throughout the workshop you can return to these boards for participants to introduce each other and find out what was the lie. This is an engaging technique from the get to know you games category of icebreaker, and it's often useful to have an ongoing get-to-know exercise during a longer session.

Group Map

Do you have people who come from many different places to your session? If you're looking for fun icebreakers for meetings that are active, Group Map is a good bet! A great way to get to know each other is to have participants place themselves on an imaginary map laid out in the room representing the country according to where they grew up. Ask them to share one internal value they got from that place, and why is that important for them. Encourage people to share a short story if they want. Sharing customs and values from your childhood can create more understanding and help form stronger bonds – a hallmark of a good icebreaker.

Jenga Questions

Jenga is the starting point of many fun gatherings. It's a super easy ice breaker activity to explain and pick up & anyone can join any time. You can spice up a regular tower-toppling contest by writing intriguing questions on each block (or as many as you can). When you draw each block, read the question out loud & answer before placing the piece on the top of the tower. This can ignite exciting conversations about everyday topics like favorite downtime activities to more in depth stuff, like career and self-development goals. *Getting to know You* games with an edge or a unique approach can make for fun icebreakers that set a team off on the right foot.

Find Your Pair

Prepare word pairs, like salt and pepper, milk and honey, sail and wind etc on separate pieces of paper. Tape one to each person's back. People then have to walk around and ask closed questions (with a yes or no answer) to find out what their phrase is. Once they find out, they have to find their pair & by continuing to ask questions (these can be open or closed) they have to learn three new things about the other.

KICK OFF A MEETING

LEGO Metaphors

Each participant gets a set of a few LEGO bricks (identical sets to everyone – a few items, around five to ten bricks per person will suffice). Everyone builds something that relates to the topic of the meeting. Afterwards, everyone gets 30 seconds to explain what their building means (e.g 'My Home', 'Interesting Experiment', 'The coolest computer ever') and how it relates to the topic of the meeting. (Optional: the figures/buildings and the metaphors may be used later on to help discussions around the table.)

Purpose Mingle

You can use this at the beginning of each meeting, it's so simple – the mark of many ice breaker activities. At the beginning of each meeting, have people walk around & share with others what they will contribute to that

> **If your actions inspire others to dream *more*, learn *more*, do *more* and become *more*, you are a leader.**
> **-John Quincy Adams**

particular session. It's a great way to enhance engagement & help people set goals & hold themselves accountable. It also makes others aware of everyone's intent.

TEAM BUILDING
Team Jigsaw Puzzle
Separate people into same sized teams. Give each a very different jigsaw puzzle (with equal difficulty & number of pieces). Each group has the same amount of time to complete the puzzle.

The secret twist is to switch up a few pieces with the other groups beforehand! Fun icebreakers can help keep a team on their toes and encourage creative thinking – try icebreakers for meetings that include an edge of competitiveness and fun to really liven things up.

The goal is to finish before the others – so they must figure out collectively how to convince other teams to give up pieces they need. This can be through barter, merging or changing teams, donating minutes etc.

This is a longer game, but one that is worth doing, since it encourages teamwork on several levels – internally and externally too.

Back-to-Back Drawing
Two people should sit facing away from each other. One receives a picture of an object or phrase. Without saying directly what they see, they should describe it to their pair without using words that clearly give it away. Their pair has to draw the specific picture.

The game requires two people to sit facing away from each other, where one team member is given a picture of an object or word. Without specifying directly what it is, the other person must describe the image without using words that clearly give away the image. This is a great game to develop verbal communication and remember that icebreaker games for work do not need to reinvent the wheel to be effective.

The Marshmallow Challenge
In eighteen minutes, teams must build the tallest free-standing structure out of 20 sticks of spaghetti, one yard of tape, one yard of string, and one marshmallow. The marshmallow needs to be on top. It emphasizes group communication, leadership dynamics, collaboration, innovation and problem solving strategy.

Egg Drop
This fun activity could be used as an icebreaker both for people who have just met and for already existing teams. Breaking people up into groups, each one needs a fresh egg, some straws, masking tape and other items for creating a package to protect the egg. Using the raw materials provided, the team goal is to build a structure that will support a free falling egg dropped from a predetermined height (e.g. seven feet) without the egg breaking. Get to know you games with an element of danger are always fun icebreakers for meetings. This is a method that shows and fosters team communication, collaboration and strategic thinking as well.

JUST FOR FUN!
What is My Name?
Stick the name of a well-known celebrity or public figure on people's backs. Have players mingle and ask each other questions to find out who they are. This is a light game that initiates easy conversations without forced & awkward small talk. Make sure the figures are generally well recognizable. What is my name is one of those icebreaker games for work that is easy to set-up and get going and is fun for all involved.

Rock Paper Scissors Tournament
This is a warm-up to really get a group energized. It is a game based on the traditional Rock Paper Scissors game but with a twist. The people who lost become fans and have to cheer for the players still in the game. The final is cheered on by a large crowd & the excitement is through the roof! If there are a larger number of people, you can have multiple tournaments.

No Smiling Allowed
This is a seemingly contradictory ice breaker that actually results in lots of smiles. Instruct everyone to keep a straight face and do not smile under ANY circumstance in the first five minutes of the meeting. People turn into

children with an instruction like this, and immediately start looking at others, seeing how they cope. The anticipation makes everyone giggly, so after a while they cannot suppress their laughter anymore.

VIRTUAL EXERCISES

Leadership Pizza

This leadership development activity offers a self-assessment framework for people to first identify what skills, attributes and attitudes they find important for effective leadership, and then assess their own development and initiate goal setting. https://www.sessionlab.com/methods/leadership-pizza

Trust Battery

This self-assessment activity allows you and your team members to reflect on the 'trust battery' they individually have towards each person on the team, and encourages focus on actions that can charge the depleted trust batteries. https://www.sessionlab.com/methods/trust-battery

Powerpoint Karaoke

Powerpoint Karaoke is an improv game where volunteers take turns presenting slide decks that they've never seen before, in front of a live audience. https://www.sessionlab.com/methods/powerpoint-karaoke

Notes

A **leader** is one who *knows* the way, *goes* the way, and *shows* the way.
-John Maxwell

Notes

Leaders become great not because of their power but, because of their ability to empower others.
-John Maxwell