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# National Fund for Workforce Solutions

VIRTUAL FACILITATION TOOLKIT

U.S. #1 IN ORTHOPEDICS

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# ROLE OF A FACILITATOR



## WHAT IS A FACILITATOR?

A facilitator is a **holder of process**. Facilitators help people or organizations do something more easily or find the answer to a problem. A facilitator may not necessarily be a content expert, but could be.

Their role is to **elevate and build on the knowledge of those in the room**. The facilitator has a big picture goal in focus but allows the synergy of the group to guide how the time is spent. **Facilitators guide participants toward the ultimate goal but remain flexible, agile and willing to change the course if needed.**



## SIX RESPONSIBILITIES OF A FACILITATOR

- 1 Scoping**  
Understanding the outcomes and objectives of the session.
- 2 Working with Partners/Community**  
Building trust and understanding.
- 3 Preparation**  
Event logistics, knowledge inputs, framing the agenda, etc.
- 4 Designing**  
The process of co-creating the agenda and modules.
- 5 Delivery**  
Implementing the design, moderating discussions, directing work, listening, etc.
- 6 Value Capture**  
Moving past the event towards impact and continued work.

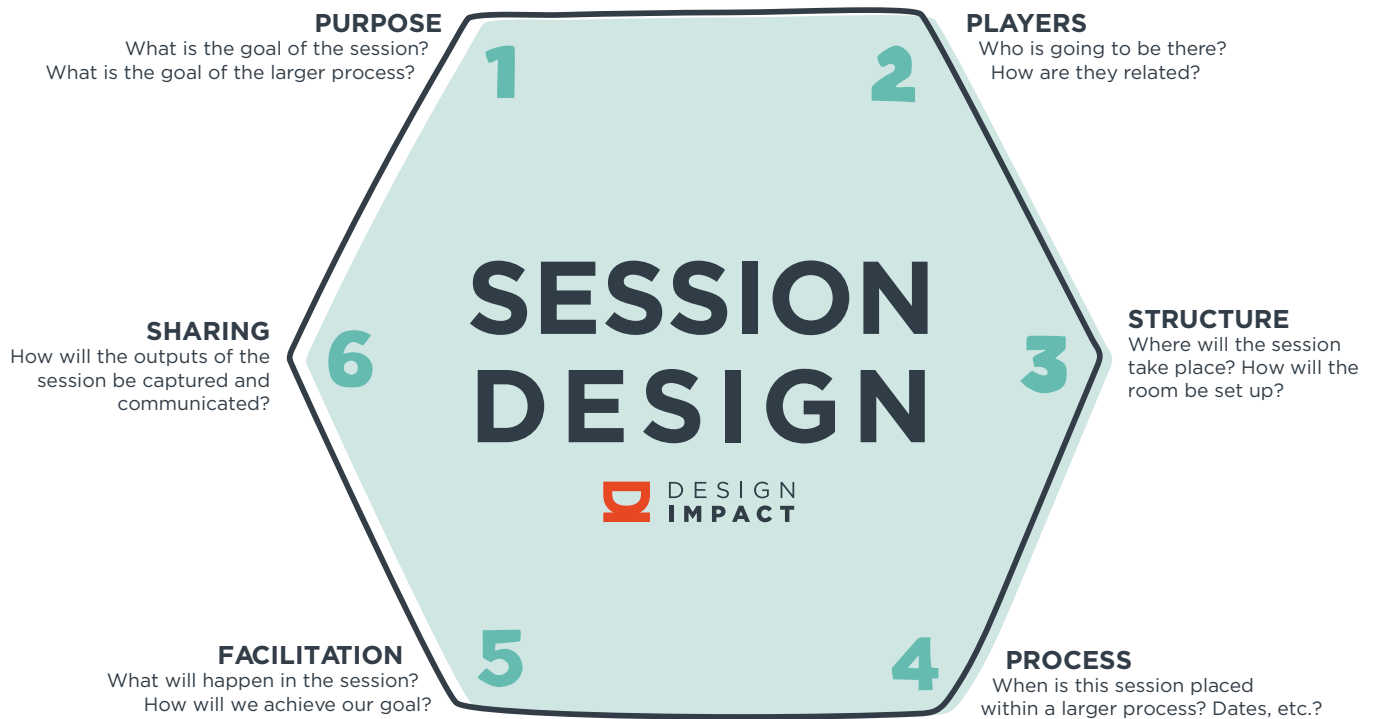


# SESSION DESIGN



## THE SIX-POINT APPROACH

The six-point approach allows session designers to consider multiple aspects of the session. To use this approach, start with purpose and move clockwise, then return and iterate on what you've designed.



Source: dpict

## DESIGNING WITH A PURPOSE

Different purposes may require radically different approaches to the session. Consider the following four approaches to help jump start your design.

### ACTIVE LEARNING

**Purpose:**

- Build capacity
- Teach new tools
- Generate new knowledge

**Process Components:**

- TEACH** - Deliver knowledge or stimulus
- DO** - Participants try it out; work with and personalize the knowledge
- DISCUSS** - Participants discuss their experience with 'do'
- REFLECT** - Participants reflect and consider how to apply knowledge to their work

### EXPLORE. FOCUS. ACT

**Purpose:**

- Ideate new solutions
- Share and work with existing knowledge
- Discover new paths forward

**Process Components:**

- EXPLORE** - Share knowledge and explore what is possible
- FOCUS** - Analyze knowledge and focus on opportunities
- ACT** - Set strategies and agree on actions

### HEAL AND CONNECT

**Purpose:**

- Deep reflection & sharing
- Bridge norms

**Process Components:**

- HEAL** - Create space for participants to reflect & share their lived experiences
- CONNECT** - Help participants build bridges between their individual stories and experiences

### DIRECTION. ALIGNMENT. COMMITMENT

**Purpose:**

- Build capacity
- Teach new tools
- Generate new knowledge

**Process Components:**

- DIRECTION** - Agree on goals
- ALIGNMENT** - Coordinate collaborative work
- COMMITMENT** - Motivate to action

## DESIGNING FOR EQUITY AND ACCESS

Making sure that your space is accessible to all participants is essential to successful session design. Consider using a pre-survey to detect any limitations that you need to consider.

- 1 Meet people where they are.**  
Consider what type of devices participants will be joining on (e.g. laptop, desktop, phone) and design accordingly.
- 2 Consider different abilities and languages.**  
Are interpreters needed to ensure access?
- 3 Consider time zones.**  
Working virtually often means working across different time zones. Consider your participants and how timing may affect their ability to participate.
- 4 Making visuals legible.**  
Consider font size, contrast, and simplicity of layouts.  
Send materials ahead of time if they are essential to read.
- 5 Don't require video.**  
People are signing in from all kinds of situations, while video is helpful, don't make it a requirement for participation.



## DESIGNING FOR REMOTE ENGAGEMENT

Remote facilitation requires thinking differently about how you design your engagement. The following six tips will help you maximize the experience for yourself and your participants.

- 1 Overprepare.**  
Remote sessions require planning. The more you work out in advance, the better the session.
- 2 Break it down.**  
Plan two shorter sessions rather than one long one. Split exercises into short steps (e.g., 5 mins). Timebox everything.
- 3 Know the tools.**  
Become the expert in how the tools work. Make sure everyone has access, and be ready to troubleshoot.
- 4 Maximize together time.**  
Get a head start and assign pre- and post-work. Then, manage the follow-up asynchronously.
- 5 Experiment.**  
Don't try too much at once. Experiment to find your sweet spot.
- 6 Have a plan B.**  
The technology and access needed for virtual sessions can derail timing and activities. Consider backup plans for when things may go wrong.

## DESIGNING NEURODIVERSITY AND LEARNING STYLES

Design your session to appeal to varying learning styles and the neurodiversity that exists in your group. Doing so will ensure optimal collaboration, engagement, and enhance the effectiveness of your time together.

### Verbal (linguistic) learners

*prefer using words, both in speech and writing.*

- Provide opportunities for sharing, verbal and written reflection, and group engagement.

### Visual (spatial) learners

*are those who prefer learning by observing things.*

- Use visuals during your remote facilitation (e.g. PowerPoint presentations, videos, or images).

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### Logical (mathematical) learners

*succeed by using order, steps, and logic.*

- Share your agenda at the beginning so these learners can follow along.
- Use section headers to help give order to your slide deck and session progression.

### Aural (auditory) learners

*are good listeners who normally learn best through verbal presentations like lectures and speeches.*

- Integrate music into your session.
- Verbalize things that are visualized.

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### Physical (kinesthetic) learners

*are all about the sense of touch.*

- Consider mailing materials ahead of time and integrating them throughout your session.
- Encourage participants to keep play dough or thinking putty nearby during your session to keep their hands active.

### Solitary (intrapersonal) learners

*work best in isolation. They are independent and prefer being away from large groups.*

- Integrate individual reflection time prior to small or large group sharing.
- Invite participants to journal their thoughts and reflections when applicable.

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### Social (interpersonal) Learners

*excel in groups and when working with others.*

- Allow opportunities for small group engagement, reflection, and collaboration.

# SESSION FACILITATION



## SETTING UP THE SPACE

How you prepare and establish the meeting space has a tremendous impact on what you can accomplish together. Below are some technical and interpersonal aspects to consider when setting up space for facilitation.



### Technology

Do all participants have technical capabilities for the platform being used?

Do you need to onboard or level set on technology?



### Light

Use front lighting to ensure viewers can see you clearly.

Minimize back lighting for optimal illumination.



### Food

Does my session overlap conventional meal times?



### Sound

Use for transitions: Match the energy you want to evoke

Use as wallpaper: Create atmosphere during group work.



### Stuff

Have I informed participants of what supplies they should have on-hand?

If special supplies are needed, have I mailed them in advance?



### People

Do I need a separate tech person?

Do I have enough facilitators for small groups?

**Tip: If doing breakout groups virtually, plan to either use self-appointed notetakers or maintain a 6:1 ratio.**



### Group Centering

Consider using a group centering activity if asking folks to go deep and share personal stories, or if you anticipate a “charged” climate.



### Group Norms/ Commitments

Consider co-creating a commitment to the collective as a group.



### Equip People for the Experience

Help group members adjust to the process with connectivity exercises such as PANning and Engagement Zones (see pages 13-15).



## EQUIP PEOPLE FOR THE EXPERIENCE | PANNING

PANning (Pay Attention Now) is a practice that will increase your ability to notice what is happening in and around you. It involves **intentionally observing and noticing your own behaviors, comments, bodily sensations, and feelings**. By raising your awareness of your own subjective experience, you can practice self-care and enhance your ability to stay engaged in difficult conversations and situations.

Avoid making judgments or creating a “story” about what you notice. Instead, PAN the specific details and facts of what you see, feel, hear. Describe what you PAN without any assumptions, interpretations, conclusions, or prejudgments.

### TRY IT FOR YOURSELF:

#### PAN THE SPACE

*Take a minute to notice your environment.*



What do you see? (This can include what you notice about the makeup of the group, set up of the room, the physical building, etc.)



What do you smell?



What do you feel around you (e.g. temperature, surface you're sitting on, etc.)?



#### PAN YOURSELF

*Take notice of what's happening in yourself.*



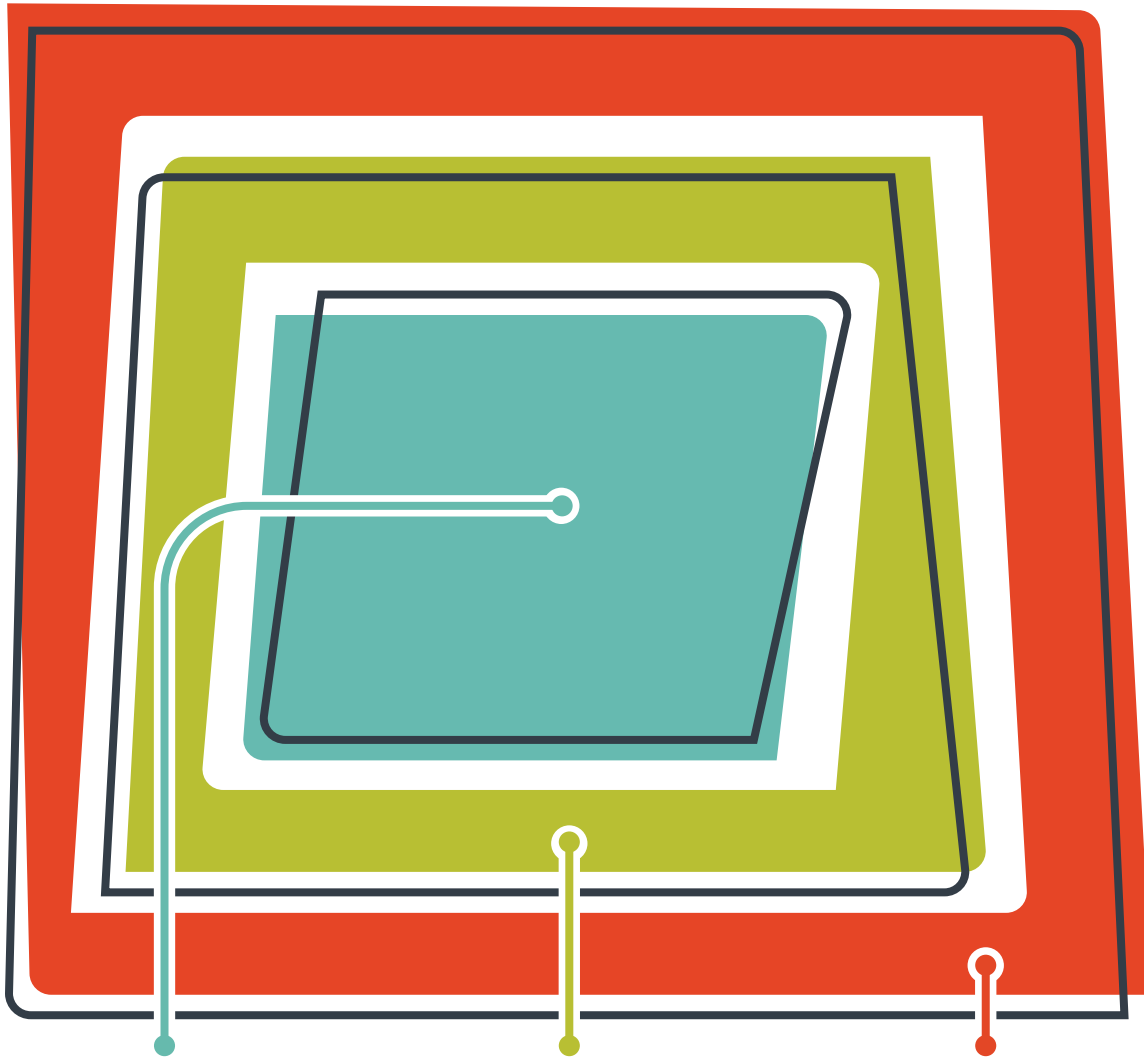
What, if anything, do you notice about your body?  
For instance, where might you be holding tension?



What, if anything, do you notice about your thoughts?



What, if anything, do you notice about your emotions?



### **Comfort Zone**

In the Comfort Zone things are familiar to us; we feel comfortable and don't have to take any risks. The Comfort Zone is important, because it gives us a place to return to, to reflect and make sense of things—a safe haven.

### **Learning Zone**

Only in the Learning Zone can we grow and learn, live out our curiosity and make new discoveries, and thus slowly expand our Comfort Zone by becoming familiar with more things.

### **Panic Zone**

Beyond the Learning Zone lies our Panic Zone, wherein learning is impossible, as it is blocked by a sense of fear. Any learning connected with negative emotions is memorized in a part of the human brain that we can access only in similar emotional situations. Experiences of being in our Panic Zone are frequently traumatic, and any sense of curiosity is shut down by a need to get out of our Panic Zone. Therefore, we should aim to get close to, but not into, our Panic Zone.

## READYING YOURSELF

Being a facilitator isn't easy! The following are a set of stances that allow you to connect with your participants and move through your agenda.

### 1 Get Grounded

- Familiarize yourself with the physical space or online platform where the session will take place.
- Find a way to get mentally and emotionally grounded before your session (e.g. yoga, meditation, prayer, etc.)

### 2 Assume a Posture of Openness

- Be open and allow participants to share their opinions even when they differ from yours.

### 3 Be Courageous

- Be prepared to address charged topics and conversations.

### Be Vulnerable and Compassionate

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- Be prepared to admit when you don't know something. Remember, you don't have to be an expert.
- Be willing to share your story.
- Accept others, even when you disagree.
- Invite emotions. Normalize emotions.

## TIPS FOR EFFECTIVE FACILITATION

Try these tips and troubleshooting techniques to help you overcome any challenges that may arise in meetings.

### PROVIDE A SAFE SPACE FOR THE TEAM TO SHARE

At times the team discussions may become difficult. People may share experiences that are particularly painful or scary. Acknowledge at the beginning of each meeting that this is meant to be as open a conversation as possible. It is also wise to ask everyone to verbally affirm what's said in the space stays in the space.

### OPEN WITH A CHECK IN

The Check In is the initial phase of a meeting and is independent of the module content. The purpose of this is to bring everyone's focus into the room and establish the discussion boundaries, so that right from the start you can be clear on how everyone is feeling that day and what to expect from each other. One technique is to go around the group and ask everyone to rate on a scale of 0 to 100% how present they feel. Are they only 75% present because they had a bad day at work and are still mulling over what their boss said? Or are they 100% present because they've been looking forward to this discussion all day?

### ENCOURAGE STORYTELLING

People love stories and they are far more likely to remember information they hear in a story than as a recitation of facts. Encourage your group mates to share their stories, and share your own. Opening up and a willingness to be vulnerable will often create a greater willingness in your group mates to reciprocate and share their own stories. It builds an atmosphere of mutual trust.

### ALLOW EACH PARTICIPANT TO COME UP WITH THE ANSWERS THEMSELVES

These discussions are not intended to feature a lecture. Instead, your goal as the facilitator is to help participants find their own voice within the discussion. You don't need to provide the solutions. Everyone in your group has access to wisdom and can help teach each other as well as teach you. A good facilitator helps find the seeds of wisdom in the room and allows them to grow. The key is not to judge, not to impose your own opinions and not to dominate the conversation.

### IMPROVISE

Facilitation is not about following the script. While facilitators provide a series of topics, questions, and activities, let the conversation guide the group. Feel free to add your own questions or explore ancillary topics and lines of discussion. You all have your own experiences, knowledge, and wisdom that will enhance these discussions. Use these topics as a starting point, and make the conversation your own.

### DEALING WITH DIFFICULT GROUP DYNAMICS

There will be times when you will be faced with challenging situations, either from individuals or from the group. If you can learn to embrace these situations, and work with them, they can be powerful experiences for learning and growth. The following, taken from *The Facilitator's Guide to Participatory Decision Making* by Same Kaner, gives some typical challenges, with suggestions for how to deal with them.



**PROBLEM****INEFFECTIVE RESPONSE****EFFECTIVE RESPONSE**

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**Everyone has different perspectives**

Try to get the group to arrive at one common understanding by the end.

Differences in understanding are good. Try to draw out the distinctiveness of others' arguments and ideas with caring and humility. If you find yourself confused or skeptical, these moments are precisely the points to stop and discuss. Ask: "Can you say more about that?" "What do you mean by XYZ?"

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**Inconsistent arguments**

Call them out.

Let the group know it's ok to change and construct new understandings as you go along. It's a key sign of intellectual growth.

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**Silence**

Filling the silence just to fill the gap.

Be comfortable with silence. Sometimes people need time to process before speaking up.

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**Highly vocal member dominates discussion**

Trying to control this person - "excuse me, XYZ, do you mind if I let someone else take a turn?"

If one person is over-participating everyone else is under-participating, so focus your efforts on the under-participators and encourage them to participate more. Ask: "How do the rest of you feel about this?"

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**Minimal participation by members who don't feel involved/interested in the particular topic**

Ignore it, and act as though silence means consent.

Look for an opportunity to have a discussion. Ask: "What's important to me about this topic?" This gives everyone a chance to consider their own stake in the outcome of the

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**Someone becomes strident and repetitive**

Talk behind the person's back. Confront the person during the break, and then be surprised when you see their anxiety go through the roof when you resume.

People repeat themselves because they don't feel heard. Summarize the person's point of view until they feel understood. People just want to feel heard, not necessarily that everyone must agree with them.

# VIRTUAL ICEBREAKERS AND OPENERS



*It is important to establish a sense of place and time around your sessions, and give people an opportunity to connect.*



## VIRTUAL ICEBREAKERS | 1. ARTIFACT PROMPT (REMOTE EDITION)



The goal of the activity is to **encourage open dialogue and reflection** through the use of artifacts, or objects, that are laying around.

### REQUIRED MATERIALS:

- Computer
- Functioning webcam
- Access to video conferencing service

### DIRECTIONS:

*Estimated time required: 15 minutes.*

1. Ask each participant to look around their room and choose an object based on a prompt/question.

For example:

- Best describes your organization
- Best describes where you've been and where you want to go (must choose two objects)
- Reminds you of your childhood
- Best describes you as a whole person
- Represents your community
- Represents what it means to be a good leader

*(To encourage creativity within limitations, ask participants to select an object without getting out of their chairs.)*

2. Once each person has selected an item, discuss why each person chose the object they did and how it relates to them.
3. Remind participants to hold up their object in front of the camera so everyone can see it.

## VIRTUAL ICEBREAKERS | 2. ACTIVE LISTENING



Video meetings can be a welcomed way to connect. However, the wealth of visual cues on your screen can quickly take your attention elsewhere.

This exercise helps you meaningfully connect with fewer distractions. Participants are challenged to **listen to each other without videos, using only their voice.**

### REQUIRED MATERIALS:

- Computer
- Access to video conferencing service

### DIRECTIONS:

*Estimated time required: 10 minutes.*

1. Invite participants to momentarily turn off their video function  
This allows everyone to focus on what other participants are saying.
2. Share a prompt, icebreaker, or check-in question with the group.

*Tip: Try sharing the prompt in the in-meeting chat box or sharing your screen.*

Example prompts:

- What's the best piece of advice you've ever been given?
- Describe yourself in 3 words.
- What do you want to be remembered for?
- What is your favorite item you've bought this year?
- How has Covid-19 changed the way you work?

*(For a more playful variation, participants can disguise their voices to make prompts more challenging and encourage more intense listening from the group.)*

3. Invite participants to respond. Once everyone has responded, consider some follow-up activities. For example:

- Have people guess who is talking.

4. After everyone has had a turn, direct participants to turn their video sharing capabilities back on.

5. Ask the group how the communication experience was different. Ask questions like:

- What did we notice when we couldn't see one another?
- What can be taken from this experience and channeled into the remainder of the call?
- In what ways is video helpful and productive?
- What does it allow us to do remotely?
- In what ways can video be challenging or distracting?



## VIRTUAL ICEBREAKERS | 3. WHITEBOARD MANDALAS



*Mandala* loosely translates to mean “circle” or “center” in Sanskrit. Mandalas are found across different cultures and religions as circular designs with repeating colors, shapes, and patterns radiating from the center.

The symbol represents an **interconnectedness of all living things**. Mandalas can be precise, carefully measured, and perfectly symmetrical, or in contrast, free-flowing, organic, and asymmetrical. This opening activity encourages meeting participants to **focus their attention and collaboratively making art** without being in the same room.

### REQUIRED MATERIALS:

- Computer
- Provided Mandala Template Worksheet
- Use of the **Zoom** video conferencing service

### DIRECTIONS:

*Estimated time required: 10 minutes.*

1. If you are the meeting host, share your screen with the provided Mandala Template Worksheet displayed. Choose the “whiteboard” option.
2. Double-check that everyone on the call can use the Zoom Annotation tool.

*Participants can access the Zoom Annotation tool when someone is sharing their screen. Under View, click Options. Select “Annotate.”*

3. Use the Breakout Room function to divide participants into groups of five.
4. Play a selection of relaxing or meditative music during the activity.
5. If you are the facilitator, mute all participants. This encourages everyone to be present and create art together without the ability to plan or communicate through talking.

6. Remind everyone that there are no right or wrong answers. Let the creativity flow.

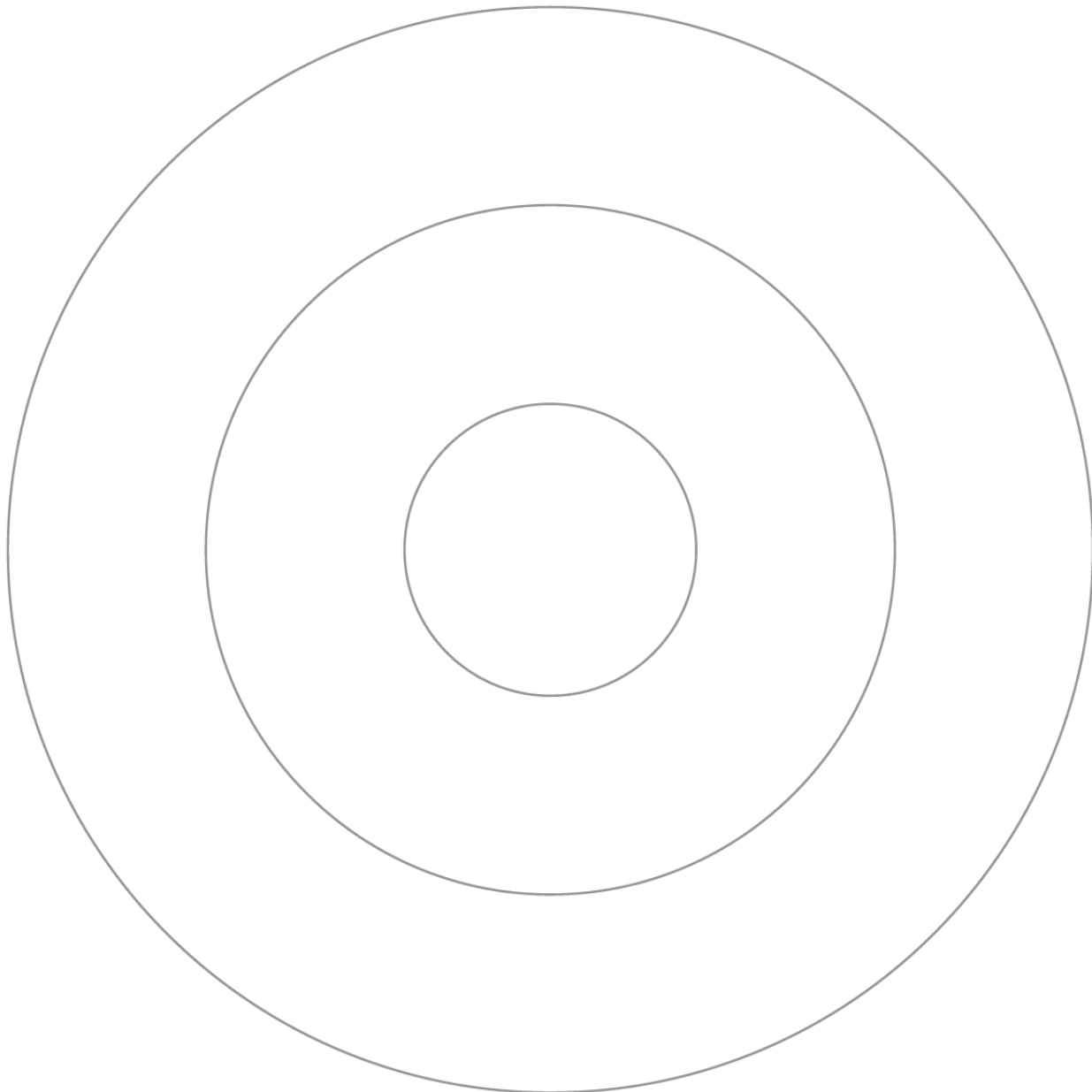
7. After three to five minutes, unmute participants and invite everyone to reconvene.

8. Discuss with the group:

- What was created?
- What was the experience like?
- What, if anything, surprised you?

# Mandala Template Worksheet

Use this template to create your own mandala.



## CENTERING ACTIVITIES

During moments of high stress, it's critical that we take care of our minds and bodies. Below you will find different **centering activities shared, tried and tested by Design Impact's team.**

### **3-Minute Body Scan Meditation**

A kid-friendly meditation on Youtube. Body scans allow us to get in touch with our bodies and help us notice where we are feeling stressed and emotional so we can acknowledge our feelings and let them go.

### **Gratitude Journaling**

Gratitude meditation is simply the practice of reflecting on the things in our lives we're grateful for. Studies have shown that gratitude can improve our mood, alleviate depression, and [even curb burnout in healthcare settings](#).

**Try it at home:** *Reframe your current situation — social distancing, self-quarantining, the COVID-19 crisis — as an event that will end soon. You only have a little time left in this situation. Take five minutes to write down what you are grateful at this moment.*

### **“Union Valley” Acupuncture for Stress Relief**

An easy acupressure method that helps relieve tension and stress just by activating a pressure point in the webbing between your thumb and index finger. Take deep breaths while applying pressure.

### **Alternate Nostril Breathing**

*Nadi Shodhana*, or “alternate nostril breathing” is a simple yet powerful technique that settles the mind, body, and emotions. You can use it to quiet your mind before beginning a meditation practice, and it is particularly helpful to ease racing thoughts if you are experiencing anxiety, stress, or having trouble falling asleep.

### **Circular Breathing**

Circular breathing is a breathing exercise that helps you visualize and feel your breath. It is an advanced breathing technique borrowed from martial arts. During circular breathing, you breathe in through the nose and out through the mouth in one ongoing circular loop. It may help to inhale quietly through your nose and exhale intentionally with sound through your mouth. Do this for up to two minutes when you need to center yourself.

### **Meditation on the Shared Human Condition**

Try these tools from [Headspace](#) — a short animated video on the “[Shared Human Condition](#)” and a 5-minute centering meditation. The video helps explain the simple but tough-to-master elements of meditation. Meditation can be a powerful tool to help us visualize and grasp concepts in new and transformational ways.

## VIRTUAL COLLABORATION PLATFORMS

Beyond Zoom and video conferencing, there are several platforms that support virtual collaboration. All of these platforms allow for real-time collaboration, as well as asynchronous work. Below is a brief description of a few tools that can be used to bring your virtual meetings to the next level.



**Google Docs** (and Google Slides) are two of the most accessible options. These simple tools allow facilitators to share live note capture, or support groups in generating content together during a session. What Google Docs may lack in visual appeal, it makes up for in ease of use and accessibility.



**JamBoard** is a simple virtual whiteboard. It is great for quick use in an informal meeting, or when participants are new to virtual whiteboards. It does not require a login and are highly accessible.



**Mural** is a robust virtual whiteboard with several built-in features that support facilitated workshops and events. This platform has a learning curve for new users but is a great tool for teams that are committed to collaboration in the virtual environment.



**SessionLab** is an online platform specifically designed to support session planning and facilitation. Very useful when working with distributed teams.



## ABOUT DESIGN IMPACT

Design Impact is a social innovation nonprofit that designs inclusive and creative approaches to complicated social problems.

We combine design, social justice, and leadership practice to address pressing issues, equip communities, and inspire social change.

[d-impact.org](http://d-impact.org)

For additional questions about this guide and our methodologies, please contact:

[ramsey@d-impact.org](mailto:ramsey@d-impact.org)

[robin@d-impact.org](mailto:robin@d-impact.org)

