

Facilitation Techniques Reference Guide

A Companion to:

Delivering High-Impact IPC Training Through Better Design and Facilitation

April 28, 2025
8:30-12:30 Central Time
San Antonio, Texas

Contents

Facilitation Techniques

- Environmental Comfort 1
- Respect and Inclusivity..... 2
- Learner Engagement 3
- Support & Encouragement..... 5
- Managing Difficult Situations 6

FACILITATION TECHNIQUE 1:

Environmental Comfort

What: Environmental factors significantly impact learning effectiveness. When participants are physically comfortable and free from distractions, they can focus better on content and participation.

Why: Creating comfortable physical and virtual environments minimizes distractions and maximizes learning. A well-prepared environment demonstrates professionalism and respect for participants' time and learning experience.

Example Strategies:

Although you won't always have control of environmental factors, pay attention to:

1. **Quiet Environment:** Choose quiet locations and minimize background noise.
2. **Appropriate Lighting:** Ensure good visibility without glare or shadows.
3. **Room Temperature:** Try to maintain a comfortable temperature. Encourage participants to bring sweaters or jackets as air-conditioned spaces are often cold.
4. **Technical Readiness:** Test equipment beforehand and have backup plans.
5. **Strategic Timing:** Schedule sessions when participants are most alert. After lunch and during late afternoons, participants may be less alert.
6. **Room Setup:** Arrange furniture to facilitate interaction and learning. Avoid classroom setups if you want participants to engage with each other.
7. **What other strategies can you think of?**

FACILITATION TECHNIQUE 2:

Respect and Inclusivity

What: Creating an inclusive and respectful learning environment fosters engagement and collaboration.

Why: A respectful and inclusive environment builds trust, encourages participation from all learners, and validates diverse perspectives. When participants feel respected and included, they are more likely to engage fully, share their experiences, and incorporate new knowledge.

Example Strategies:

1. **Establish Clear Guidelines:** Set clear expectations for respectful behavior at the start of training.
2. **Model Respectful Interactions:** Address participants politely and tactfully.
3. **Recognize Diversity:** Acknowledge and celebrate diverse backgrounds and experiences.
4. **Consider Representation:** Consider whether you, as a facilitator, best represent the audience. Consider (if available) inviting a co-facilitator who is representative of the participants.
5. **Inclusive Materials:**
 - a. Ensure training materials reflect diverse imagery, examples, and case studies/examples.
 - b. Consider color-blindness: Many tools are available online to help you build presentations and materials.
 - c. Different types of Materials: Provide different options for participants to engage with content (e.g., reader's guide, worksheet to fill out) to ensure
6. **Get to know your participants:** If you can learn about your participants ahead of time, this can help you tailor your materials and approaches.
7. **What other strategies can you think of?**

FACILITATION TECHNIQUE 3: Learner Engagement and Interaction

What: Engaging learners through interactive techniques helps ensure training is meaningful and impactful.

Why: Engaged learners retain information better, participate more actively, and are likelier to apply what they've learned. Effective interactive techniques maintain attention, increase motivation, and deepen the learning experience.

Example Strategies:

1. **Think-Pair-Share:** Present a concept, have participants think individually, discuss with a partner, then share with the group
2. **Case Studies:** Present real-world scenarios for analysis and problem-solving
3. **Role Play:** Have participants act out scenarios to practice skills or demonstrate concepts
4. **Small Group Discussions:** Break participants into small groups to discuss specific questions or topics
5. **Gallery Walk:** Create stations around the room with different topics; participants rotate through stations, adding ideas.
6. **Polling/Audience Response:** Use digital tools or hand raising to gather quick feedback during a presentation
7. **Brainstorming Sessions:** Encourage rapid idea generation on a specific topic or challenge
8. **Peer Teaching:** Have participants teach a concept to each other after learning it
9. **Demonstration with Practice:** Show a technique, then have participants practice it immediately.
10. **Problem-Based Learning:** Present a problem at the start and solve it as concepts are introduced
11. **Fishbowl Discussions:** Small group discussions are held in the center while others observe, then participants are rotated.
12. **Knowledge Checks:** Brief quizzes or questions throughout the presentation
13. **Scenario Cards:** Distribute cards with scenarios for small group discussion

14. **Simulations:** Create realistic scenarios for participants to work through
15. **Round Robin:** Have each participant add one idea to build a collective response
16. **Buzz Groups:** After presenting key information, give groups 3-5 minutes to discuss the application
17. **What other strategies can you think of?**

FACILITATION TECHNIQUE 4: Support & Encouragement

What: Creating a supportive and encouraging environment helps participants feel valued, confident, and engaged.

Why: Adult learners respond positively to support and encouragement, reducing participation anxiety and reinforcing learning. A supportive environment increases motivation, builds confidence, and creates psychological safety for taking risks and asking questions.

Strategies:

1. **Identify Shared Goals:** Highlight collective goals to foster unity and purpose, emphasizing how IPC practices protect patients' and staff safety.
2. **Create a safe space:** Encourage questions and share ideas without judgment.
3. **Provide positive feedback:** Provide opportunities to give participants direct feedback on their progress.
4. **Respond to Concerns:** Address questions and concerns promptly and thoughtfully.
5. **What other strategies can you think of?**

FACILITATION TECHNIQUE 5:

Managing Difficult Situations

What: Effectively handling challenging situations or participants maintains a positive learning environment and meets training objectives.

Why: The best-planned training sessions can encounter resistance, disruption, or conflict. Skillful management of these situations prevents them from derailing the session, maintains group cohesion, and transforms challenges into meaningful learning and growth opportunities.

Example Strategies:

1. **Stay Calm:** Maintain composure when faced with difficult participants or situations; take a deep breath and use a steady, clear voice to show control and help de-escalate tension
2. **Encourage Dialogue:** Ask the person to share concerns with statements like "I see you have some concerns. Can you please share more about what's troubling you?"
3. **Acknowledge Feelings:** Show empathy by validating their feelings with statements like "I understand this situation is frustrating for you, and I appreciate you bringing it to my attention."
4. **Reframe Problems:** Focus on the situation rather than the person; say "Let's review the procedures together" instead of "You're not following procedures correctly."
5. **Address Dominant Participants:** Gently redirect conversation with phrases like "Thank you for your insights. I'd like to hear from others who haven't had a chance to speak yet."
6. **Manage Side Conversations:** Address them directly but respectfully with "I notice there's a separate discussion happening. Is there something we should address as a group?"
7. **Handle Resistance:** Validate concerns while focusing on benefits with "I understand your hesitation. Many have found that this approach saves time in the long run."
8. **Redirect Off-Topic Discussions:** Use a "parking lot" method to acknowledge the point while staying on track: "That's an interesting point that deserves attention. Let's add it to our parking lot and return to it later."
9. **De-escalate Tensions:** If disagreements arise, acknowledge different perspectives and find common ground: "I appreciate both viewpoints. Let's identify where we agree first."

10. **Set Boundaries:** Establish clear expectations about behavior when needed: "In this training, we need to ensure everyone feels respected when sharing their views."

11. **What are other strategies you can think of?**
