Facilitated activities are the public face of teaching. When preparing to facilitate learning, instructors can use a facilitation plan to maximize the effectiveness of face time with students or workshop attendees. Effective facilitation plans include time after each activity for the facilitator to assess his or her facilitation performance. To help instructors create facilitation plans, this module provides a universal template that can be applied in any discipline.

Need for a Plan

Careful planning lies at the heart of successful performance (Black, Harrison, Lee, Marshall, & Wiliam, 2004). The planning process recommended in this module will help instructors attend to facilitation principles (3.2.1 Overview of Facilitation), work through the facilitation methodology (3.2.3 Facilitation Methodology), and anticipate learner needs (3.2.6 Identifying Learner Needs). Since the needs of learners frequently arise from the way they take in and process information, most facilitators will find it beneficial to reflect on these issues and develop a written plan to address them. The preparation of a written plan before facilitating an activity serves as a prompt during facilitation, forms a permanent record of what was attempted by the teacher during the activity, and is a convenient tool for assessing facilitation performance.

Components of a Plan

A complete plan consists of three components. The first component encompasses planning prior to the facilitation (page one of the Facilitation Plan template). The second component involves recording data during the facilitation (page two of the template). And the third component assesses the quality of facilitation against learning outcomes, thus linking the facilitation plan to classroom execution and to outcomes. All three components are clearly identified in the template at the end of this module.

Part 1: Prior to the Activity

1. In preparing to facilitate a classroom activity, begin by establishing outcomes for the activity that emphasize the skills you intend to stress. The first example given in the Facilitation Methodology (3.2.3) module, introducing members of a new community to each other, illustrates this process. The desired outcomes for the activity are having each community member recognize the special qualities of every other member; making the first team activity a confidence-building one; promoting the experience of learning as fun; and emphasizing the fact that all students are accountable for their own learning. Note that to accomplish these outcomes, learners will need to use skills in empathizing and building self-esteem from the affective domain, skills in attending and rephrasing from the social domain, and skills in making connections and using divergent thinking from the cognitive domain. Evidence that the outcomes are being accomplished includes respectful language as the teams interview each other, full participation of all team members in the activity, and smiles along with signs that no one is goofing around.

2. Once outcomes are established, select an activity type to facilitate the outcomes (2.4.14 Designing Process-Oriented Guided-Inquiry Activities). Note that the outcomes or activity type selected may require different group sizes and roles.

3. Define any roles needed to support the outcomes and activity type (3.4.2 Designing Teams and Assigning Roles). In the example above, the facilitator decided to use a pair-share interview activity, so roles were not needed.

4. Prepare students for the planned learning activity through some type of pre-assessment. Students can prepare for many activities by completing an assignment prior to class. Pre-assessment in this case might be a quiz to help each student determine how well he or she understood the material in that assignment. Another way to prepare students is to plan a discussion at the beginning of class to make sure everyone understands concepts or issues that will be important to the planned learning activity. If the class will need to use the skill of rephrasing, for example, facilitators might want to budget ten minutes to elicit definitions of rephrasing and ask participants what evidence would prove that they were successfully rephrasing. This also elevates student awareness of a skill that can improve performance.

5. In the activity set-up, give the students an overview of the activity, making sure to focus on the purpose, expectations, roles, and amount of time allocated, including closure time. Also identify the learning skills students should focus on during the activity. In the example of getting the class more comfortable with each other, the facilitator tells students that the purpose of the activity is to introduce them to each other and make them comfortable in their groups. The facilitator notes that all class members are accountable for their interview information, that the format of the activity will be pair-share for twenty minutes, and that each student should focus on attending and rephrasing. The
facilitator also emphasizes the centrality of rephrasing to the success of this activity, thus preparing students for their pre-assessment activity in rephrasing. If the pre-assessment indicates a need for improvement, students must be prepared to engage in activities that will elevate their skills in rephrasing.

6. Anticipate what to expect when observing the group work. List the skills on which learners should focus (listed in the outcomes) and anticipate situations during the activity when you might observe them performing the skill. This will result in better real-time observations, improve interventions on process, and help participants create meaning and improve skills (Johnson & Johnson, 2003). In the example of getting to know one another, attending and rephrasing were given as skills in the outcomes, so the facilitator would expect to see some interchange between the two in the pair share, rather than just nodding of heads.

7. Plan for closure of the activity by addressing a variety of questions: What will be shared between the teams? Will the facilitator participate in sharing? Will the data be recorded on an overhead, a computer, or on sheets collected from the groups? Will groups report on and/or turn in reflector and recorder reports? In the example we have been exploring, each student might be asked to introduce his or her interviewee and share something unique about the interviewee with the class. For activities that involve more cognitive outcomes, sharing discoveries about the material can concretize understanding.

Part II: During Activity

8. Follow through with the set-up and timing plan made prior to class. In the example, the plan calls for the activity set-up, followed by some whole class brainstorming on the definition of rephrasing and on qualities of effective rephrasing. This work is reported and recorded, and the teams are instructed to begin the pair-share activity. In any facilitation plan, the facilitator needs to note the effectiveness of the assessment, of participant preparation, and of the activity setup. He or she also notes how much time was spent.

9. During the activity, monitor the teams for real-time data on the interactions in the groups. Collect data by focusing on the identified skills but remain open to other observations. Include evidence of outcomes being met, questions asked by team captains, and your responses. Record any interventions you make and the result (3.2.7 Constructive Intervention and 3.2.8 Constructive Intervention Techniques).

10. During the closure period, document the team’s oral reports. The better your notes are during the classroom session, the more real-time data you will have to improve your performance as a facilitator.

Part III: After the Activity

11. During an activity, considerable data is often generated in the form of recorder reports, reflector reports, and closure notes. Analyzing this data reveals the difference between what was planned for the activity and what actually occurred. If the activity went well, it is useful to identify the key factors that came together to make it a success. If the activity did not help students meet the desired outcomes, review the components of the activity. Were the outcomes too broad? Was the activity type appropriate? If the students were not prepared, what could be done about this in the future? Did closure result in significant learning growth? Make sure to store lessons learned along with your activity sheets.

Assessing Facilitator Performance

12. A facilitation plan is also useful for improving the facilitator’s performance. If the activity outcomes are not met, the facilitator must decide if something is wrong with the activity and, if so, how to fix it. It is more important, however, to decide what to do in the next class session to improve the facilitation. For best results, the method used to assess the facilitator should generate strengths, areas for improvement, and insights about the facilitator’s performance (4.1.9 SII Method for Assessment Reporting).

Concluding Thoughts

The template given here serves as a both a prompt and an organizer for facilitation planning. It will take strong discipline to complete the template for each class, especially the “during” and “after” activity portions. Faculty who use all components of the facilitation plan are often motivated by the opportunity to use a portfolio of their plans as research for publication and/or to enhance their tenure applications.

References


Facilitation Plan—Prior to Class

1. **Outcomes** *(List 2-3 outcomes and underlying skills from different domains and describe anticipated evidence that each has occurred.)*
   - 
   - 
   - 

2. **Activity Type** __________________________________________________________
   *(See Activity Types and select the one which best aids outcome achievement.)*

3. **Roles** *(See 3.4.2 Designing Teams and Assigning Roles)*
   ____________________________________  ____________________________________
   ____________________________________  ____________________________________

4. **Preparation Assessment Plan**
   time allotted_______________

5. **Activity Set-up Plan**
   time allotted_______________

6. **Group Work**
   time allotted_______________
   *(Identify issues that may affect performance, link them to learning skills, and describe your anticipated response.)*

<table>
<thead>
<tr>
<th>Situation</th>
<th>Skill</th>
<th>Intervention</th>
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<tbody>
<tr>
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<tr>
<td>Affective:</td>
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7. **Closure**
   time allotted_______________
Facilitation Plan—During/after class

8. Pre-Assessment and Activity Set-up Notes
   time spent

9. Group Work Notes
   time spent
   Situation   Skill   Intervention   Result

10. Closure Notes
    time spent

11. Reconciliation
    \textit{What evidence demonstrates that outcomes were met? Use data from group work to document.}

12. SII of Class Period