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| Planning Worksheet |
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This is the Planning Worksheet section of the Facilitator Guide, which is inspired by the excellent example set by Peer-to-Peer University’s [Learning](https://www.p2pu.org/assets/uploads/learning_circle_downloads/facilitator_handbook.pdf) [Circles Facilitator Handbook](https://www.p2pu.org/assets/uploads/learning_circle_downloads/facilitator_handbook.pdf) and by the adaptation by Richmond Public Library in their [Supervisor](https://www.dropbox.com/s/xru0bfdzhezbpq4/Supervisor%20Learning%20Circles%20Facilitator%20Guide%20FINAL.pdf?dl=0) [Learning Circles Facilitator Guide.](https://www.dropbox.com/s/xru0bfdzhezbpq4/Supervisor%20Learning%20Circles%20Facilitator%20Guide%20FINAL.pdf?dl=0)

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This worksheet was first developed for the [Access to Civil Legal Justice](https://www.webjunction.org/explore-topics/access-civil-legal-justice.html) project in collaboration with the Legal Services Corporation.





# Key Components for Planning a Learning Group

 think through the key components of planning to facilitate a learning group. The checklists in the final section of the Facilitator Guide will steer you through the chronological sequence of tasks to be accomplished for each component.

## Administrative Buy-in

Do you need **administrative buy-in** to organize and conduct your Learning Group? If so,

whose permission do you need to obtain? What talking points will you use to persuade them?

## Recruitment

Who will you **recruit** for your group? How will you recruit them? How large is your group likely to be? How will you persuade them to join the learning group?

## Time Frame

What is your overall **time frame** for working through the course(s) with your Learning Group, making sure to allow time to absorb and apply learning?

## Dates and Times

Based on your availability and schedule, what are the optimal **dates and times** for engaging withyour Learning Group? Are there any other professional events occurring that you should consideras you schedule, e.g. local conferences, summer reading?

# Key Components (continued)

## Formats and Tools

What **format(s) and tools** will you choose to facilitate your Learning Group?

* + a) Will you meet **face to face** always, occasionally or not at all? If yes, what locations are available?
	+ b) Will you gather **online synchronously**? What technology will you use (video conferencing tools, live chats or hangouts)? Do you need training on the technology?
	+ c) Will you conduct **asynchronous** discussions? What technology will you use

(possible tool options: email, Facebook group, threaded discussion forum, listserv)?

* + d) What ideas do you have for **creating a welcoming environment** in any format?

## Flexibility

How **flexible** can you be as you coordinate with the availability of your group participants?

## Your Preparation

How much time will you need to schedule to **prepare yourself for facilitation**? What materials or resources will you need to provide or create in support of your group? (Consult the checklists in the next section.)

# Planning Group Discussions and Activities



 









## Look for:

* + What are the **learning objectives** for the course? Use these to check learners’ progress through the course on meeting the objectives.
	+ Review the **course description** and **table of contents** to get an idea of key topics and the sequence of the content.
	+ Skim each lesson to find **questions**, **quizzes**, or **activity instructions**. Consider how the learning group could work through those together to augment their individual learning.
	+ Focus on topics or issues that will benefit most from the **varied perspectives** and

**ideas** that the group brings to the learning experience.

* + Identify opportunities for **reflection**, tapping the benefits of reflecting on how learning was or might be applied effectively in their workplace.

## Examples

1. **Discussion prompt**: For a course on how libraries can respond to the needs of people experiencing homelessness, ask learning group members to prepare for the group discussion by finding their library’s policies related to behaviors associated with homelessness. At the meeting, ask participants to share their experiences and challenges in implementing the policies. Work together to propose solutions and appropriate responses.
2. **Activity**: For a course on how to conduct a reference interview, arrange for the learning group members to pair up and practice conducting a simulated interview with each other. Then come together as a whole group and reflect on the practice—what worked well, what could be improved.

# Advance Planning at a Glance









## 6 Weeks Prior

* Discuss plans with any affiliated organizations
* Find a space (physical or virtual)
* Choose dates and times
* Identify the learners you want to include in your group

## 4 Weeks Prior

* Explore the online course
* Promote the opportunity to intended audiences
* Gather information about your participants

## 2 Weeks Prior

* Confirm attendance with all applicants
* Confirm space reservation with venue or online setup
* Revisit the online course content to create an agenda for the meeting

## 2—4 Days Prior

* Prepare the final agenda
* Send reminder email to the Learning Group participants
* Prepare yourself for facilitation
* Collect and confirm availability of supplies needed

## During and Wrap-up

* Set up the environment to be welcoming and inclusive
* Begin each meeting with a check-in
* Set up a “parking lot” for topics not covered in the meeting
* Summarize the key take-aways for the meeting
* Review the parking lot topics and decide if/how you will address them
* Set upcoming expectations