

Learning Group Facilitation Guide



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This Learning Group Facilitation Guide is inspired by the excellent example set by Peer-to-Peer University's [Learning Circles Facilitator Handbook](#) and by the adaptation by Richmond Public Library in their [Supervisor Learning Circles Facilitator Guide](#).

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INTRODUCTION

Courses that are designed to be self-paced often pose challenges for the learner, especially around feelings of isolation and lack of motivation. This guide provides a framework for organizing, structuring and leading a group of learners through self-paced courses on any topic. Once you understand the value of learning in groups, you will gain insights into setting up the logistics, facilitating discussions and guiding a group toward learning success.

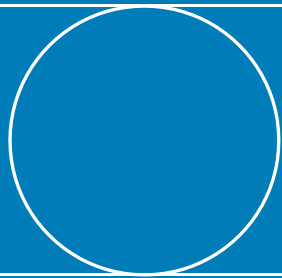
WHY LEARN TOGETHER?

"By convening a group of learners who are interested in a similar topic, you've got the basis for an open, collaborative learning environment that has the potential to be the support system many learners need. Peer learning can create a rich learning environment in which everyone simultaneously teaches and learns, acts and observes, speaks and listens." (P2PU Learning Circles Facilitator Handbook, www.p2pu.org).

Learning groups are lightly facilitated study groups for people to learn together. They provide a collaborative environment that has the potential to increase motivation as the group sets attainable goals together and connects their learning to practical application. Learners in a group share ideas and insights, answer each other's questions, and expose each other to new perspectives and solutions. They form bonds as a community and reflect together on progress, which boosts confidence.

WHAT IS A LEARNING GROUP FACILITATOR?

Learning group facilitators are not teachers and are not expected to be subject matter experts with "correct" answers on the topics. Your primary role is to convene and coordinate the group and to guide discussions. As a facilitator, you will be helping to cultivate an environment in which learning and sharing among participants leads to desired outcomes. You may be involved with the group as a co-learner, or you may be guiding at the higher level of a training coordinator or supervisor.



Facilitating Your Learning Group

Tactics and Tips for Success

Foster Social Connections

Members of your learning group come with varied personal experiences and different motivations. As a facilitator, understanding what each individual brings to the group and what motivated them to join will help you cultivate an environment in which learners can clearly see how the Learning Group will help them achieve their desired goals.

In this section, you'll find suggestions for building social cohesion with your group, from preparing the meeting space to establishing norms for learning together. Whether you're convening your group face-to-face, live-online or asynchronously online, you can promote the sense of community that increases motivation to learn.

CREATE A WELCOMING ENVIRONMENT

First impressions are important for learners entering the group space for the first time. Whether you are meeting in person or online, be aware of the environment and do your best to create a positive, welcoming atmosphere for learning.

Setting up the **in-person space**:

- ◆ Set up chairs in a circle for a non-hierarchical arrangement.
- ◆ Provide name tags (and table tents); orient participants to restrooms, login for wifi, etc.
- ◆ Adjust room lighting and temperature if possible.
- ◆ Add colorful touches, such as flowers or posters.

Setting up the **live-online space**:

- ◆ Provide a pre-session orientation to the online platform so learners can test their audio and video, and get comfortable with the interactive features.
- ◆ If possible, have a tech support person to troubleshoot technical situations with participants in the background so the entire group is not delayed by one person's tech issues.
- ◆ If using video, consider the backdrop behind you. Is it colorful and/or interesting to look at or is it drab and gray? Or is it too full of details that might distract attention?

Setting up the **asynchronous online space**:

- ◆ Provide clear directions on how to connect with each other virtually and set clear expectations for participating asynchronously.
- ◆ Be aware that not everyone will be active in online forums but realize that "lurking" or just reading posts is how some people prefer to learn online. If you're in a position to award a certificate of completion or other form of continuing education credit, you may decide to require at least one response per discussion question in order to earn the credit.

CREATE A GROUP ATMOSPHERE

Social cohesion begins to develop within an hour of people being together. Some ideas for encouraging social cohesion include:

- ◆ Agreeing on a group name
- ◆ Establishing rituals (traditions, habits, weekly activities)
- ◆ Using plural pronouns (we instead of *I*)

START WITH A CHECK-IN

Take some time to go over what a Learning Group is and help members understand what to expect. Clarify your role as a *member* of the circle, not the teacher. You are all learning together.

Then get to know each other. You may want to start each session by going around the circle. For your first session, you might start with introductions. As the facilitator, be prepared to go first and model this.

- ◆ Who you are
- ◆ Where you work
- ◆ Your role in relation to the course topic
- ◆ Share a favorite book, movie or show; or something you learned recently

For subsequent sessions, use this check-in time to take the pulse of the group experience:

- ◆ What's working well for you in the self-paced course? What's not working?
- ◆ What's working well in the learning group? What's not working?
- ◆ What might you need help with?
- ◆ Recap what your group learned and decided at the previous session
- ◆ What were the key takeaways?
- ◆ Were there any parking lot items or unanswered questions?

ESTABLISH NORMS FOR LEARNING TOGETHER

Starting with your first session, agree to learning norms or ground rules with your participants. These can be customized or changed later if the group agrees.

You may want to keep the norms prominently displayed for your group discussions to keep them front-and-center in the eyes of participants. For face-to-face meetings, you could have them written on a flipchart at each session. For live-online sessions, the norms could be listed on an introductory slide. For entirely asynchronous discussions, you could send the list with your email reminders, or post to the discussion space.

The goal is to create a safe zone for constructive participation.

Sample norms to follow:

- ◆ Be present and listen when others speak.
- ◆ Speak one at a time.
- ◆ Take responsibility for your own learning and support that of the group.
- ◆ Help us stay on time.
- ◆ Accept that all ideas are valid.
- ◆ Lean into your discomfort. Explore ideas where there is disagreement rather than dismissing them.
- ◆ Provide timely feedback.
- ◆ Avoid personal attacks and don't take disagreements personally.
- ◆ Respect confidentiality. Acknowledge that the Learning Group is a safe space for discussion.
- ◆ Have fun! Enjoy the social aspect of your learning community.

Tips for Fostering Discussions

During a learning group meeting, your primary role is to foster healthy and productive discussions that further the group's learning. It is a balancing act between providing enough direction and control to stay on track with the topic of the session and providing autonomy to the group members to discover their own best paths to learning. It takes practice. The following tips are good to keep in mind or on hand, whether you're meeting in person or virtually.

KEEP DISCUSSIONS ON TRACK

Provide a meeting agenda and set time guidelines for the flow of the discussion. You may appoint a timekeeper in the group to call out when it's time to move to a new agenda item.

Use a "parking lot" if needed to record any runaway topics or unanswered questions on a flip chart or white board. Doing this shows that you hear the concern and that it will be revisited, allowing you to refocus the group on the course or discussion at hand.

It's up to you to let group members know when they are veering off-topic. Be ready to sideline conversations or tangents that could get your group off-topic by saying things like:

- ◆ "We'll be learning more about that in the next session."
- ◆ "Let's put that in our parking lot and circle back after we get through this course."
- ◆ "We are now discussing something that isn't on our agenda. What does the group want to do?"

MAINTAIN AWARENESS

Be observant and learn to read the energy of the room. Throughout the meeting, take the pulse of participants' engagement and mood. Who seems really motivated today? Who is particularly quiet? Is one learner quiet because they are struggling with a basic concept? Ask somebody who is a few steps ahead if they don't mind helping out.

Acknowledge individuals frequently, visibly, and sincerely, and encourage other participants to do the same. This applies to online discussions as well as in-person.

ENSURE THAT EVERYONE CAN PARTICIPATE

Ensure that all participants feel supported, seen, heard and encouraged. As facilitator, be mindful of different personalities, and create opportunities for everyone to have a chance

to participate in discussions. This may involve asking targeted questions or checking in with participants who haven't yet spoken. Use a strategy such as, "Let's go around the group and hear what everyone thinks about ..."

You want to be intentional about surfacing differences of opinion, particularly if you sense that some group members are holding back and reluctant to challenge the dominant opinion. You could say, "I think we're trying to avoid disagreeing with each other. Who would be willing to voice a different opinion?"

LISTEN ACTIVELY

Expect to listen more than speak. Listen intently to understand what each group member is saying. If it isn't clear, paraphrase what someone has said, that is, repeat back what you heard. For example, "What I'm hearing is [paraphrase]. Is that right?" Ask probing questions such as, "Can you tell me more about that?"

ENCOURAGE NEW THINKING

Elicit different viewpoints and perspectives. You might ask participants to consider the idea or situation from a different angle. Using a course on effective storytimes as an example, you might ask "As a caregiver at storytime, how do you think you would react to an early literacy tip?"

SYNTHESIZE IDEAS

Aim to get group members to comment and build on each other's thoughts and ideas. Ask questions such as "Jackie, what would you add to Ellen's comment?" Conclude each discussion with a wrap-up of the key takeaways, asking the group for additions or edits to your summary. Alternately, you could ask a group member to summarize.

MANAGE QUESTIONS

Remember that you are not the teacher of the group. When a question comes up, emphasize that the group members are their own valuable resource. Probe for knowledge-sharing with questions like:

- ◆ "Did anyone else run into the same problem?"
- ◆ "Where would you start looking to figure that out?"
- ◆ "Have you thought of looking for ideas from other practitioners in the discussion forums within the self-paced course?"

FLIP FRUSTRATIONS INTO CONSTRUCTIVE DIALOGUE

If conversation in a session becomes contentious, it's a good time to remind members of the agreed-upon norms (See page 7). You may even want to add a new norm in the middle of a conflict.

Take the lead in exploring multiple perspectives involved in a disagreement. Remind group members to avoid becoming emotional or argumentative, but to state their point of view calmly and clearly. Call out inappropriate behavior and reinforce productive behavior.

Aim to reframe frustrations in a constructive way and use them as an opportunity for learners to work together. You might ask someone to give specific examples to back up their statement. This allows the group to look at a specific situation rather than a more general opinion. If someone disagrees with some part of the course content, ask them to be specific about what they recommend to improve it.

You may want to stop the discussion to focus on the emotions in the room, asking each person to say how they are feeling at the moment.

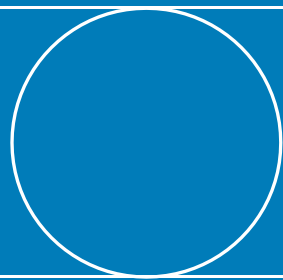
STEP OUT OF THE FACILITATOR ROLE

If you are learning the course alongside your group members, you may want to share your comments and perspectives on the content. That's fine, but it's best to let the group know that you are stepping out of your role as facilitator.

You might ask a group member to assume the facilitator role for awhile. This invests leadership outside of yourself and reduces dependency on one person.



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Planning Worksheet

Key Components for Planning a Learning Group

The questions in this worksheet will help you think through the key components of planning to facilitate a learning group. The checklists in the following section will steer you through the chronological sequence of tasks to be accomplished for each component.

1. 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?

2. 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?

3. 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?

4. DATES AND TIMES

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

Key Components (continued)

5. 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?

6. FLEXIBILITY

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

7. 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

The great advantage of a learning group is the collaborative opportunity to discuss course topics and practice applicable techniques together. As facilitator, you will be the guide and will need to come to each group meeting prepared for these discussions and activities.

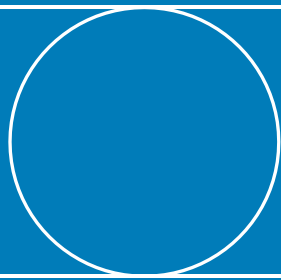
Some self-paced courses may include a discussion or learner guide, which you can use as a starting place to customize the conversations for your group. If there is no ready-made guide, you will need to skim the course in order to formulate your own plan.

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?



Planning Checklists

Tracking Logistics

Advance Planning at a Glance

This high-level look at the steps involved in planning and implementing your Learning Group is meant to help you plan your time and effort and check off items as you accomplish them. It may look intimidating, but each of these steps is attainable and is explained in more detail on the following pages.

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

Phase 1 Checklist (4-6 weeks prior)

Getting organized well before the first meeting of your learning group will lead to a better experience for everyone—for you as the planner and for the group members. You will be more calm and prepared when you first greet your group. Participants will be able to focus on the learning right from the start.

6 WEEKS PRIOR

Discuss plans with any affiliated organizations

- ◆ Do you need to obtain buy-in from a supervisor or director?
- ◆ Are you collaborating with other organizations or libraries?

Find a space (physical or virtual)

- ◆ If you will meet in person, locate and secure the room or other physical space for your group to meet.
- ◆ If you will meet virtually, identify the tools you will use to connect. If you are trying a new tool, test it now to confirm that it will work for your purpose.

Choose dates and times

- ◆ Determine how frequently you will meet with the group. Block out the dates and times in your schedule.
- ◆ If it's a very small group, you may be able to wait and poll the group about their preferred times.
- ◆ Confirm that the physical or virtual space you have reserved is available for all the dates/times identified.

Identify the learners you want to include in your group

- ◆ Learning Groups work best with small, enthusiastic groups of people - ideally between 4 and 10 learners.
- ◆ Do you have a list of specific people to invite? Great!
- ◆ Will you need to promote the opportunity to target audiences to solicit participation? Think about how you will persuade them about the benefits and value of joining the learning group.

4 WEEKS PRIOR



Explore the online course

- ◆ Look through the selected course to determine how you might want to align the modules and topics with the dates and number of group meetings you are planning.
- ◆ Remember, you are not expected to be a teacher of the content, but you will be the one who guides the group through the content.



Promote the opportunity to intended audiences

- ◆ Prepare marketing messages and materials. This could be a printer flyer or poster, or an online announcement. What's most important is to convey the benefits of learning in a group with *you* as facilitator. Be sure to include:
 - ◇ The course title
 - ◇ Dates, times and duration of the Learning Group engagement
 - ◇ Venue for the meetings (face-to-face, online or both)
 - ◇ A contact number, weblink or email address where people can find out more
- ◆ Identify channels for communication and broadcast the opportunity (email, listservs, Facebook, Twitter, etc.)
- ◆ If you have a specific list of participants, prepare and send invitations. Include your persuasive messaging even if you think they are already on board.



Gather information about your participants

- ◆ If you have a small group and you know the members personally, you can communicate informally in person or by phone or email.
- ◆ For larger audiences, it's helpful to have an application for the purpose of getting a little background on the learners, not to create a selective admission process. The application could include:
 - ◇ Name and email address/phone number (so you can contact them).
 - ◇ Their goals (so you know what they are looking to get out of it).
 - ◇ Their experience with self-paced learning, online learning or group learning.
 - ◇ If they have the necessary technology for accessing the self-paced course and for joining interactive online meetings (computer, internet connection, VOIP or phone).

Phase 2 Checklist (2 weeks to 2 days prior)

As you get closer to the start of the Learning Group, you'll be glad you already set several things in motion. Note that the checklist for "2 Days Prior" will apply to the lead-up to all of your subsequent group meetings.

2 WEEKS PRIOR



Confirm attendance with all applicants

- ◆ Send a welcoming email message to those you have agreed to participate in your Learning Group.
 - ◇ Include the dates, times and location so participants can mark their calendars.
 - ◇ Inform them that you'll be sending more information about location and access soon.



Confirm space reservation with venue or online setup

- ◆ For a physical space, identify the primary contact person. Confirm the room setup that you'll need (seating, tables, easels, screen, projector, Wi-Fi connection, etc.)
- ◆ For online meetups, familiarize yourself with the functions of the software or platform. Determine if you will need a tech support person for the group sessions.



Revisit the online course content to create an agenda for the meeting

- ◆ Look at the module(s) of the self-paced course that you will cover in your first group discussion.
 - ◇ What is the main subject matter learners will be covering this week?
 - ◇ How does this tie into the major goals of the course?
 - ◇ Are there any activities this week that would be enhanced by doing them as a group?
- ◆ For co-learners: if you will be taking the full course yourself, you could start going through the videos and activities now so that you'll be one or two steps ahead of the rest of your group.

2-3 DAYS PRIOR TO EACH MEETING



Prepare the final agenda

- ◆ Include the structural part of the meeting:
 - ◇ For the first session, include the introductions and reviewing meeting norms.
 - ◇ For subsequent sessions, include the recap of the previous session and review of what's working/not working for the group.
 - ◇ For all sessions, include the main topics for discussion and summary of key takeaways.
- ◆ Identify specific resources you might want to link to or print out.



Send reminder email to the Learning Group participants

- ◆ Include:
 - ◇ Date, time and location (physical address or login information)
 - ◇ Technology requirements
 - ◇ Agenda for the meeting, with links to sections and/or resources in the course that will be relevant to the discussion and activities



Prepare yourself for facilitation

- ◆ Review the any guides you'll be using for this meeting so it's fresh in your mind.
- ◆ Think about your goals for the session in alignment with discussion guides.
- ◆ Review the Facilitating Your Group section of this guide.



Collect and confirm availability of supplies needed

The following list of supplies applies to in-person meetings:

- ◆ name tags, sign-in sheet, and printed handouts
- ◆ flip chart or white board, markers
- ◆ monitor or projector if viewing course content together
- ◆ outlets and power strip(s) for laptops
- ◆ snacks and/or coffee, drinks

Phase 3 Checklist (During and wrap-up)

All the careful preparation culminates in the direct interactions with your Learning Group. Whether it's in person or online, it's most important to help members feel engaged with the group and the learning. This list is not intended as a prescription, but as suggestions for how you might conduct your meetings.

START OF EACH SESSION

- Set up the environment to be welcoming and inclusive.
 - ◆ Refer to “Setup a Welcoming Environment” on page 5, which includes suggestions for in-person, live-online, and synchronous engagements.
- Begin each meeting with a check-in.
 - ◆ First meeting:
 - ◇ Give everyone the opportunity to introduce themselves.
 - ◇ Establish the norms for group learning.
 - ◆ Subsequent meetings:
 - ◇ Acknowledge and introduce any new people.
 - ◇ Address any adjustments to what's working or not working for the group.
 - ◇ Recap the key takeaways from the previous meeting and go over the agenda.
- Set up a “parking lot” for topics not covered in the meeting.
 - ◆ In-person: use a flip chart to collect topics
 - ◆ Online: designate a discussion thread just for parking lot topics.

WRAP-UP OF EACH SESSION

- Summarize the key takeaways for the meeting.
 - ◆ You can do this in your more objective role as facilitator.
 - ◆ Or you can have the group identify their key takeaways and then synthesize them into your summary.
- Review the parking lot topics and decide if/how you will address them.
- Set upcoming expectations.
 - ◆ Remind everyone of the schedule, logistics, and topics for the next meeting.
 - ◆ Review the learning targets and expectations for group members.