EVENT FACILITATION HANDBOOK

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Learn

Table of Contents

Why Use This Handbook?

1 City leaders are required to balance two critical components when working to find solutions for cities. It is necessary for event facilitators and trainers to consider how they deliver messaging as well and the content they are delivering.

Trainers must balance:

1. Technical knowledge
3. Management, leadership, and interpersonal skills

WRI Ross Center does much more than provide technical training and assistance (orange bands themes in the figure). At the heart of the technical support it provides, the center has developed a practice around dialogue facilitation, collaboration, and alignment among stakeholders (blue bands). The combination of both technical and "soft", or management, skills will determine leaders' ability to bring about coordinated action triggering city-scale transformations.

This handbook offers our staff and partners a series of theoretical frameworks and facilitation aids that can be used in supporting our three main engagement objectives:

1. **Facilitate Individual Learning:** Equip city leaders and professionals with the knowledge and skills they need to design, implement, and/or manage sustainable urban development projects.
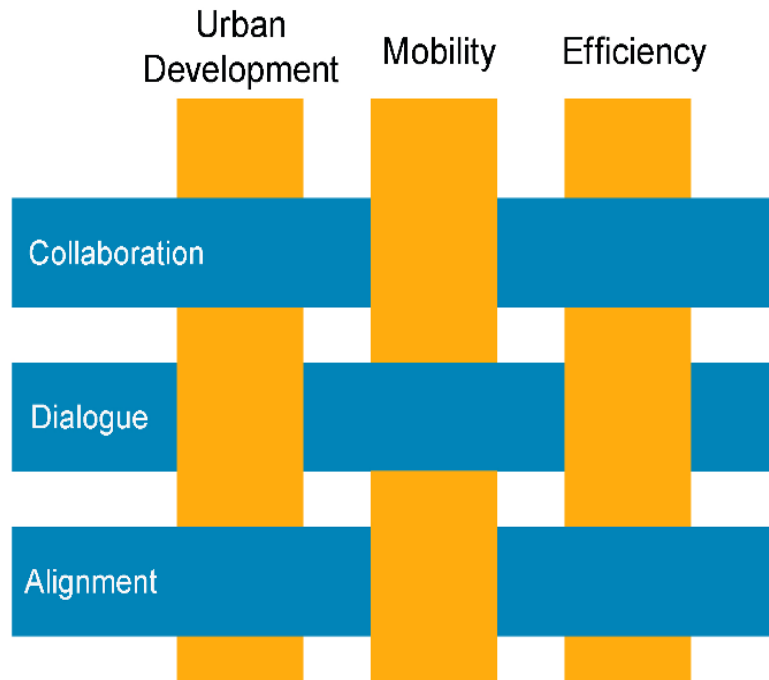

2. **Build Coalitions:** Cultivate strong alliances for common vision to catalyze cohesive action by stakeholders from public, private, and civil society institutions.
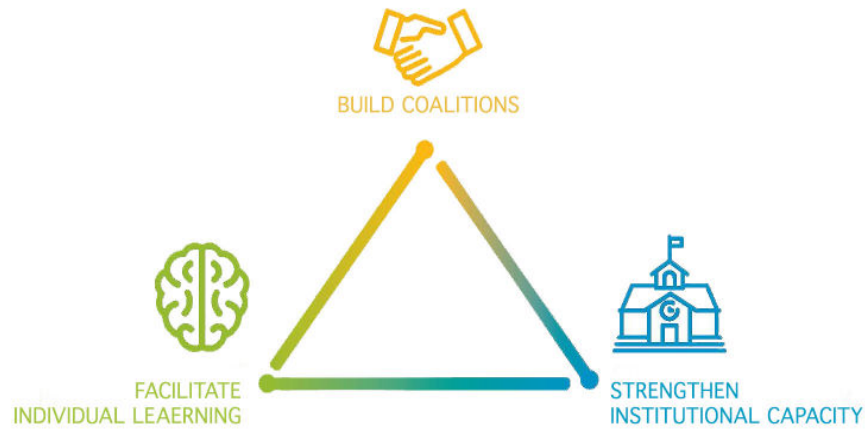
3. Strengthen Institutional Capacity: Foster coordinated action for effective delivery and management of sustainable urban development projects.

This handbook is designed to support you in delivering effective and meaningful engagement sessions. It includes a sequential outline of how to develop, manage, and follow up on engagement sessions series (Prepare—Engage—Apply), as well as a series of pedagogical theories and techniques that will help you align your engagement activities to needs of your target audience. The handbook does not bring technical content to your session. Instead, it will help you curate a journey to make big ideas a reality.

Creating Engaging Event Objectives

BUILD COALITIONS

FACILITATE INDIVIDUAL LEAERNING

STRENGTHEN INSTITUTIONAL CAPACITY

Build Coalitions

Facilitate Individual Learning

Strengthen Institutional Capacity

Cultivate strong alliances for common vision to catalyze cohesive action by stakeholders from public, private, and civil society institutions.

Equip city leaders and professionals with the knowledge and skills they need to design, implement, and/or manage sustainable urban development projects.

Foster coordinated action for effective delivery and management of sustainable urban development projects
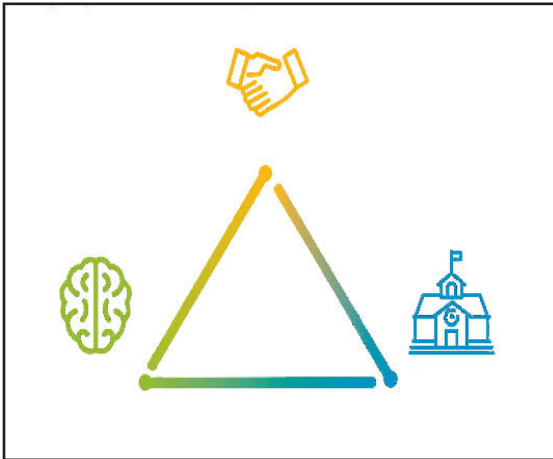
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WRI Mexico
Taller de Eficiencia Energéticas
en Edificaciones

WRI Ross Center
for Cities
sub-Saharan African Workshop

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Quality standards for capacity offer:

• Sessions are designed with the target audience and engagement objectives in mind.

• Marginalized groups are represented and encouraged to actively participate

• Leadership and technical skills are equally prioritized in the training

• Path dependency and the local context (including language barriers) are recognized and embraced

• Team work and coordination across sectors is recognized as a key for successful project implementation

• Relevant strategy performance metrics are collected and reported

• Narrative debrief report is written that includes participant(s) profile, event's focus, key takeaways, and next steps

Intended Outcomes

- Increased awareness among individuals and organisations of transformative
  paths
  towards sustainable urbanization
- Provision of knowledge, expertise, and skillsets needed to catalyse transformative
  change in cities
- Creation of a community of practitioners and stakeholders with a common vision
  and desire for action

Prepare-Egage-Apply

2

Effective capacity development requires more than just effective facilitation. It requires thoughtful planning in advance of engagement opportunities, as well as diligent engagement with participants after capacity development activities.

The Prepare—Engage—Apply framework breaks down guidelines for each of the three main phases (Planning, Facilitation, Follow- Up), and some tips on how to pursue those guidelines

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	Prepare (Before)	Engage (During)	Apply (After)
Be Aware of Your Audience	- Have local representatives as co-organizers - Have the appropriate number of participants -Get to know your attendees backgrounds and expectations - Highlight underrepresented groups	Help building connections and enable participation - Adapt your agenda to suite participants' needs - Diversify your agenda to keep people on board	Identify further opportunities for best performers
Curate a journey and assess impact	Prepare an engaging agenda based on objectives and feedback from your team and partners. - Choose the right set of tools and exercises reflecting on your target audience and objectives. - Assign roles to your team (note taker, time keeper, facilitator)	Encourage feedback and reflection at different stages - Capture performance metrics and testimonials (template attached)	Evaluate participants' feedback - Store and share your results with your team and donors. - Report your metrics every quarter
Connect with learning resources (Blended Learning)	Share agenda and materials one week before - If the goal of your training is to facilitate individual learning, consider providing your participants with a questionnaire in advance to assess their pre-existing knowledge on the topic of the training	Support your workshop with on-line learning resources (Learning Guides, Videos, Blogs, or Recorded Webinars)	Follow up with participants and share relevant content (e.g. LGs) - Highlight related activities - Connect participants - If you provided a pre-training questionnaire, administer a post-training survey to gauge level of participants' learning

3 Core Questions for All Learning Experiences:

What do I want people to know?

• What are the key concepts and ideas that you want your participants learn and remember?

What do I want people to be?
• Are you hoping to train people to effectively manage infrastructure, projects, and/or city institutions; serve as change agents; or help realize another objective?

What do I want people to do?
• Always consider the follow-up actions you want to inspire your participants to pursue. This will help ensure that the content of your training engagement has an impact beyond the confines of the dedicated training activities.
• How will you inspire people to take action in support of sustainable urban development?

Other Tips

• **Lead with framing questions**—for each activity you prepare, use open ended framing questions that can help catalyze group discussions toward your learning objective(s).

• **Give instructions incrementally**—give them facilitation instructions sequentially as they go through different stages of an activity to not overwhelm people.

• **Use silent journaling to catalyze discussion**—silent journaling (asking participants to take time to write responses to your prompts before discussion) can be used to help participants grow more comfortable with sharing their thoughts with the group during interactive exercises.

• **Pair and Share**—during interactive sessions, begin the participant feedback component by splitting the larger group into pairs. Often, individuals will not feel comfortable first sharing their ideas with a larger group, but one-to-one interaction sets a comfortable space for initial through expression and discussion.

• **Use two-stage experiential debriefs**—reserve some time at the end of each exercise to reflect. **First** ask participants to consider their experiences during the exercise. **Second**, asks participants to connect those exercise-specific takeaways to their own work).

Doing this helps to drive home the key lessons of each exercise that you plan and does so in a way that makes the content easily and directly relatable to each participant's experience.

Assessment, Challenge, and Support (ACS) Learning

• Research by the Center for Creative Leadership has identified three key components necessary for adults to thrive in learning: assessment, challenge, and support (ACS). Assessment: receiving accurate data or feedback about their current state

- Challenge: experiencing a genuine opportunity for action, risk, and failure
- Support: information, encouragement, celebration, or other help that ensuresthat failure is not catastrophic and enables the learner to step back, reassess,and grow

• ACS must take place in the context of relationship. Relationship involves a setting of mutual trust and respect between learner, facilitator, and other learners. Relationship does not necessarily take a long time to build but can be done intentionally in a short amount of time (e.g., by using the social identity activity).
• **Use this framework to consider what happens over the course of a workshop or program**, especially if significant learning progress is one necessary outcome. Consider whether the information presented and structures or methodologies used allow for a balance of these three ACS elements in a context of relationship. If those things are present, learning will likely take place.

Push/Pull

• Effective training engagements require a balance of giving information to participants (push), and coaching critical thinking and dynamic engagement from them (pull). In practice, pushing is exemplified by lecture-style sessions where information flows primarily one way from lecturer to audience. Pulling, on the other hand, is exemplified by the facilitation aids in this handbook, which seek to motivate participants to be dynamically engaged with one another and with the facilitator. Limiting push activities and staggering them between application-oriented pull sessions can help to keep participants focused and open to new learning. By asking participants to apply concepts, pull activities help build stronger retention capacity in participants.

When possible (based on time, available space, participants' physical condition, etc.), continually adjust the physical environment of the training engagement. Remaining in the same seats and seating arrangement for long durations of time can lead to stagnation; whereas altering the physical environment on an exercise-by-exercise basis leads participants to connect with different people, change their perspective, and think in a less constrained manner. Making such adjustments can include employing the following techniques:

- Ask participants to choose different partners for each pair-and-share session.
- When conducting Visual Explorer or Collaboration Explorer, have participants stand.
- Use group seats in smaller tables spread around the room, rather than a U-shape or theater-style seating arrangement.
- For pair and share, encourage small groups to exit the primary meeting room and discuss their thoughts in a different space.

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Even the best of agendas can lead to fatigue or may be met with unexpected results. Although it is important to try to stick to your agenda and training goals, a disengaged audience will not retain information. It is important, then, to continually pay attention to signs from your participants and adjust different aspects of your exercises and agenda as needed. If people are not forthcoming with feedback in large group discussions, try silent journaling followed by pair and share. If participants are engaged in a constructive, dynamic discussion that is running over the allotted time, consider letting the discussion continue so long as it is constructive, rather than strictly adhering to the set time allotted in the agenda. If you can tell that participants are fatigued, consider adding an unplanned break of 10 to 15 minutes to give everyone time to recharge.

If you have identified your key objectives, you will be able to effectively adjust your agenda to accommodate the condition of your participant group without sacrificing your training goals.

Research and additional reading: One of the most accessible introductions to adult learning research and its impact on effective training is The Art and Science of Training by Elaine Biech (Association for Talent Development, 2016). This book contains a generous overview of relevant adult learning, neuroscience, and psychology research supporting these varied techniques for workshop organization and presentation (along with many other good ideas and concrete suggestions).