



A facilitator's guide for continuing medical education (CME) sessions

A facilitator's role is to guide a group of people through co-operative processes, including collective decision-making, so the group can fulfil its purpose as easily as possible.

Hunter D, Bailey A, Taylor B. The Art of Facilitation. Auckland, NZ: Tandem Press; 1994. (p 8)

1. Opening the session

The opening of a CME session is important for establishing the learning relationship: Who are you? Why are you/they here? What are we going to do together? How are we going to proceed? What are the rules for conduct within the group?

It is most effective for generating good states for learning if you:

- introduce the session and broadly give the structure; for example, presentation and questions or whether there will be a small group activity
- introduce the presenter and briefly mention their background
- get the presenter to outline what they propose to cover and how they want to take questions – as they come, hold them over as they are covered a bit later in the structure of their presentation or answer questions at the end.
- set up the ground rules for the session. These could include, for example, confidentiality, and the fact that it is okay to ask naïve questions.

2. Presentation

Professional speakers advise presenters to cover not more than five to nine key concepts and use examples and personal work experience to illustrate the key concepts. Relevant case studies and examples ground a presentation and help people relate to the topic.

In general, lecture-style presentations should be kept to a minimum. Research shows that people are unable to concentrate effectively for more than about 20 minutes – ideally 20 minutes of presenter talking should be followed by time for discussion or an activity.

The needs the group has for the presenter's knowledge may vary from what the presenter has prepared in advance – people's questions provide feedback on where they would like more detail. For questions that require an in-depth answer and seem to be an issue for a particular individual only, the presenter will need to decide whether it is best to deal with the issue in session, or arrange to meet with the person afterwards to discuss.

3. Using small group activities

Although learning styles differ, most adult learners prefer to be actively engaged in learning activities. Small group activities provide a means to achieve this. Write up instructions on the whiteboard or flip chart regarding what the group activity is once people are formed into groups; this allows anyone to ask questions if they are not clear. (Visual learners can have difficulty remembering a set of verbal instructions and they are the people who say, "What did s/he say to do? What group am I in?").

To allow equal participation in discussion, sort people into groups of four to eight, depending on the learning activity they have been given. The easiest means of doing this is to give people a number, ie count 1, 2, 3, 4, 5, 6 and then advise them where each group will meet (eg Group 1 go to the right-hand corner at the front of the room, etc.). This can also be done by giving out coloured dots on registration. Sorting the group is a little directive, but it saves time and energy for people to focus on the learning activity instead of milling around the room trying to find out where they should be and what they have been asked to do.

An alternate to sorting is to allow participants to self-sort into groups – tell people to find a partner (or between two and five other people) and find a place to work on the group task together. A disadvantage of doing things this way is that people tend to stick with people that they already know. To mix things up a little, for the next group activity you may want to instruct participants to find a different group to work with.

4. Troubleshooting

Things that go wrong in groups	What to do about it
Organisation	
Equipment failure	<p>Check the presenter's needs for equipment and if they are bringing a presentation that it is in a format that is compatible with the equipment provided. Advise people to bring back-up resources, eg a print-out as well as the electronic copy of the presentation. Arrive early and test the equipment is working.</p> <p>If all else fails, reconfigure the session as a group discussion.</p>
People are late; do you wait or start on time?	<p>It is advisable to start on time as this sends a message to perpetual latecomers that it is important to come on time and the session success will be affected if bits are rushed to make up for a late start. The exception is if your presenter is late.</p>
Managing the presenter	
What if the content is at the wrong level – they already know this or don't need to know it or it is over their head? How do we cater for different levels of knowledge in the group?	<p>Avoid this problem by checking out what is relevant to the audience as part of your preparation.</p> <p>Pitching content at the middle ground is common with group teaching. If things do go wrong, don't panic – provided that there is enough time for discussion, the group will bring the topic around to the appropriate level.</p>
What if someone asks a question the presenter can't answer?	<p>The presenter does not need to have all the answers – they can stimulate thinking in different ways. Open the question up to the group – does anyone know? Adult learners have experience and the roles of teacher and learner can swap. This dynamic changeover of roles is embodied in the traditional Māori concept of teaching and learning or <i>ako</i> where the boundaries of teacher and learner blur and the roles often swap.</p>
Presenter talks about themselves too much.	<p>Prevent this by giving presenters a specific briefing to focus them on:</p> <ul style="list-style-type: none"> ■ a suggested structure for the session ■ what content is relevant to the audience ■ the sorts of questions that may come up. <p>If things are going wrong use paraphrasing and questions to get them back on track.</p>
Several members of the audience are looking bored.	<p>Prevent this by briefing the presenter beforehand on what is relevant to the group. Suggest that they outline what they are going to cover at the outset.</p> <p>Inform the presenter to stop lecturing after 20–30 minutes and give people an activity so they can process the information – less is more!</p> <p>If all else fails, ask for a brief discussion period – the questions that arise will stimulate the audience and give the presenter a sense what people want more detail on.</p>

Things that go wrong in groups	What to do about it
<p>Presenter goes off the agreed topic</p>	<p>Prevent this by giving presenters a specific briefing on what is required beforehand.</p> <p>If intervention is necessary, ask the speaker a key question to refocus them to the topic, or ask for feedback from the group (“Do we want to spend time on this?”)</p> <p>If all else fails, the facilitator may need to take control – physically stand and direct, or ask others in the group for key questions.</p>
<p>Presenter goes over time</p>	<p>Prevent this by communicating your expectations to the presenter beforehand. Let them know that there will be, for example, 20 minutes of presentation time and 10–15 minutes for questions/discussion, and that they should not plan to talk for all the allocated time.</p> <p>Facilitate firmly – use control tactics, such as giving speakers a two-minute warning before the end, or use a bell.</p> <p>If appropriate, involve the audience in re-scheduling: ask if most people would like the session to continue for, say, another 10 minutes, and let them know that if anyone has an urgent commitment, they can leave early.</p> <p>Establish a culture of being on time.</p>
<p>Managing group dynamics</p>	
<p>What if a member of the group is using question time to make lengthy statements of their own rather than really asking a question of the presenter?</p>	<p>The facilitator may need to intervene in question-taking to say, “Thanks ... , we have heard your point of view and now I'd like to give others the opportunity to ask the presenter questions and take advantage of his knowledge in this area. Does anyone else have any questions for the presenter?”</p>
<p>How can a dominating group member who takes too much air time be controlled?</p>	<ul style="list-style-type: none"> ■ If you think there is a strong possibility of this happening, set clear ground rules with time limits and parameters for discussion related to the session outcomes ■ Recognise the contribution, but interrupt and divert ■ Facilitator can veto the contribution (“We have already heard from...” or “Let’s hear from someone else.”) ■ Speak to the individual outside of group ■ Rotate group roles ■ Move discussion round the group or circle.
<p>What if a quiet person isn’t getting the opportunity to speak?</p>	<ul style="list-style-type: none"> ■ Ask for comments ■ Use smaller groups ■ Change the group mix ■ Use written questions ■ Change seating ■ Control dominating group members (see above) ■ Remember that introverts often prefer to speak last as they do their thinking internally and need time, whereas extroverts think aloud. Introverts may also prefer not to participate in group discussions, so allow for the option of passing when comments are requested. ■ Ask the quiet person individually at the end of the session what they got out of the session.

Things that go wrong in groups	What to do about it
<p>What if someone tries to hijack the session and divert it to his or her own hobby-horse?</p>	<p>Check with the group: “We invited the presenter to talk on x subject; do the majority of the group wish to discuss this issue instead or should it be picked up outside the session?”</p>
<p>What if there is conflict between two members of the group, eg taking opposing philosophical viewpoints.</p>	<p>Deal with conflict overtly by</p> <ul style="list-style-type: none"> ■ prompt acknowledgement ■ a gentle reminder of why they are here (verbal) ■ a non-verbal approach – alter the environment by standing up, do a pointed ‘impose self’ close-in ■ giving each person a specified period of time – say two to five minutes – to present their case without interruption. If people feel heard, this defuses the situation, and also the timeframe controls it. This can be an effective technique for disputes. ■ using paraphrasing and reflective listening so people feel heard and don’t keep repeating their point. Different viewpoints are natural; the important thing is a culture of respecting different viewpoints ■ inviting two parties to pick it up outside the meeting <p>If all else fails, call the police and evacuate the building.</p>
<p>Discussion wanders</p>	<p>At the outset, state the purpose and outcome of the session (eg “Our outcome for this session is... Does anyone want to add anything?”)</p> <p>A facilitator’s role is to bring the group back to their outcome if group members are taking the session off track by reminding them of the outcome.</p> <p>Have a ‘park sheet’ for questions/comments outside the scope of the meeting and these can be referred on to the appropriate person or picked up in a later CME session if the group wants to.</p> <p>The exception is where there is a burning issue that is of concern to most of the group and the whole group agrees to change the planned agenda.</p>
<p>Side conversations and debates</p>	<p>Prevent this by including in the ground rules for the day how the meeting is to be run.</p> <p>If it does occur:</p> <ul style="list-style-type: none"> ■ Stop the speaker. Put the person in the side conversation on the spot – it could be an important issue to discuss ■ Use two facilitators if necessary ■ Check volume of speaker and venue issues ■ Use of humour to defuse situation, without being offensive. <p>Remember that the problem may not necessarily be the side chatter; it could be inherent in the teaching approach if the speaker is relying too heavily on lecturing. Avoid this by structuring the session to allow for discussion. If necessary, ask the group if they want to take a minute to discuss with the person sitting next to them.</p>
<p>What if someone is being negative or you disagree with the point that they are making?</p>	<p>Acknowledge their point of view, paraphrase, wrap up and say, “I’d like to move on now...”</p>

Things that go wrong in groups	What to do about it
<p>People look tired or low in energy.</p>	<p>Attend to group process and comfort and don't focus on giving information by monologue for the whole session; having an interactive exercise(s) structured into the session helps avoid this problem.</p> <p>If necessary:</p> <ul style="list-style-type: none"> ■ Vary the topic/process ■ Use energising exercises, eg moving to different parts of the room, or exercises such as rubbing your head and patting your tummy simultaneously. ■ Tell a joke, riddle or story to change the emotional state ■ Encourage interaction ■ Check environmental issues such as temperature and lighting ■ Encourage participation in planning the schedule ("Should we take a break now or...?") ■ Take a break and allow people to refresh. <p>A listless group may be a sign of withheld dissatisfaction. If the facilitator feels the session isn't working and there is sufficient trust within the group, they could open discussion on how to improve the session. This is best done by an experienced facilitator.</p>
<p>What if some people look unhappy?</p>	<p>The learning experience is the responsibility of everyone in the group, not only the presenter.</p> <p>If a significant number of people look unhappy and you feel able to change tack, you could discuss their concern and modify the session to meet their needs.</p>
<p>Requesting feedback</p>	
<p>I don't know if I got the session right for this group.</p>	<p>Get feedback on the session.</p> <p>Be clear about what you want feedback on and what you can do with the information you collect, and let people know why you want feedback and what you do with it. It is essential to keep it simple and brief or people won't do it.</p> <p>If you use a written form, give it to people at the beginning so they can reflect as they go through the session, and build time to do it into the session.</p> <p>If you outline the session structure at the beginning, let people know there is time set aside for them to give feedback.</p> <p>With a group of 20 or fewer, you can do a verbal round of what people got out of the session (this reflection can help to embed the learning that has occurred).</p>

Two books that provide in-depth coverage of group processes are

- *The Zen of Groups – a handbook for people meeting with a purpose* by Dale Hunter, Anne Bailey and Bill Taylor
- *The Art of Facilitation* by the same authors.