

Institute for Training and Development Facilitation Guide



2022

Talbert House
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Cincinnati, Ohio 45206

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Introduction: Who We Are

The Talbert House agency's network of services focuses on prevention, assessment, treatment, and reintegration. Services are provided at multiple sites throughout Southwest Ohio.

The organization has a culture of innovation that thrives on the creation of new services to meet the complex needs of clients, their families and the community while maintaining effectiveness, excellence, and professionalism. Talbert House values an integrated system of high-quality care focused on best practices, easy access to services and providing a full range of services in a cost-effective and efficient manner.

Last year, Talbert House served over 30,000 clients face to face with an additional 146,000 receiving prevention and hotline services.

Company Background

Talbert House was founded to help homeless men re-enter the community. In August 1965, with a budget of \$30,000 from private donations, the first halfway house program opened.

Today, Talbert House operates in multiple service areas in conjunction with its affiliates throughout Greater Cincinnati. The services are offered to a broad-based population with the agency's mission in mind: empowering children, adults, and families to live healthy, safe, and productive lives. Talbert House helps thousands of men, women and children throughout Southwest Ohio overcome adversity to become healthy and productive citizens.

Talbert House was named after Dr. Ernest Talbert (1879-1971), Professor Emeritus of Sociology at the University of Cincinnati, for his support of community alternatives rather than institutional care.

Our Vision and Mission

Vision

A caring community that believes in recovery, second chances, and personal growth.

Mission

The Talbert House mission is Empowering children, adults and families to live.

Our Staff

The staff members have a wide range of educational and disciplinary backgrounds, from criminal justice and social work to psychology, and chemical dependency counselling. The staff receives extensive training from the IDT Institute for Training and Development (ITD).

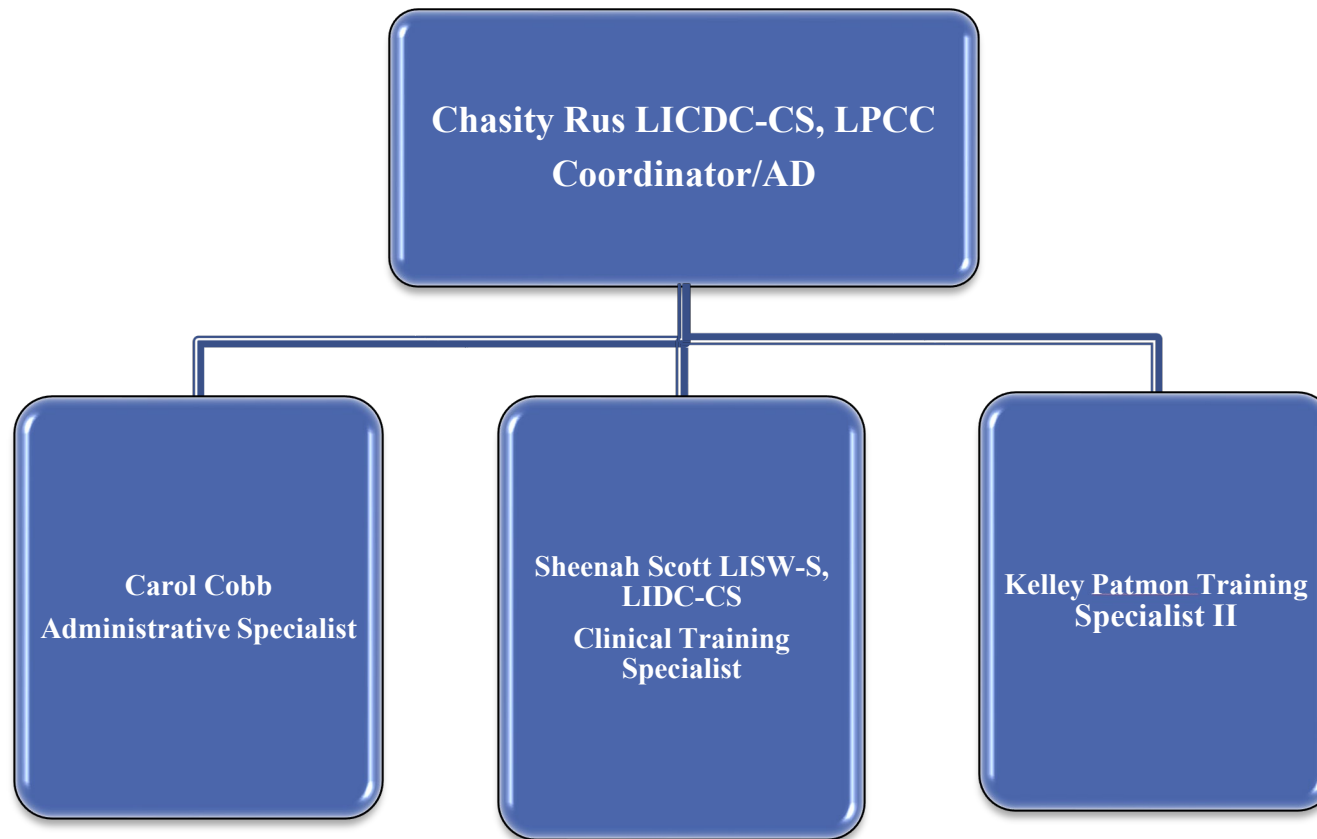
The ITD is focused on developing and delivering high-quality training and educational programs to the behavioural health community within the Talbert House. Clinical and professional development training is offered to those that are working in the areas of mental health, substance use, corrections, and other professional settings.

Purpose of the Guide

The Facilitation Guide is designed to facilitate training sessions for the Talbert House Institute for Training and Development (ITD) Staff. In addition to the training, the guide contains information on the role of the facilitator.

The Training Coordinator, Chasity Rush MRC, LICDC-CS, LPCC, TRCC, Talbert House, requested training for the (ITD) staff. After a thorough analysis was performed by the project manager, the need for training was identified. The ITD staff are unable to work together as a team to accomplish their goals. They do not have the skills that is needed to resolve conflict when there are differences in opinions. Training will help develop and foster strong working relationships with the staff and their clients.

INSTITUTE FOR TRAINING AND DEVELOPMENT STAFF



Facilitator Responsibilities

The facilitator is responsible for managing meetings, keeping conversations on track, and ensuring each member's voice is heard. This guide covers the basic tips for how to accomplish these tasks.

This guide contains:

1. **What are the Facilitator's Responsibilities?** - This section provides an explanation of the role of the facilitator. In the simplest definition a facilitator is someone who makes things happen – a meeting, a connection, a learning agenda.
2. **What Do I Do?** - Facilitation is not an easy job. It is a challenging role, and this section provides some concrete suggestions and trouble-shooting tips on managing challenging events and individuals.

Things to consider when you are creating a facilitation plan:

1. What are the learning objectives you wish to cover in this session?
2. How much time do you have for each topic?
3. What activities will you utilize to support the learning objective?
4. How will you know that participants understood the learning objective? How will you assess the learning? Will you use quizzes, self-reflective assessments from the participants, or group projects?

Facilitating a Training

When serving in this role, your goal is to have a productive training session. By effectively mediating the group process, you play an active and critical role in ensuring the training is a success. You may want to consider using [Attachment E- Working Group Session Worksheet](#) (pg. 14), as a basis from which to build your full working group session worksheet.

1. Take into consideration the overall goal of the training and what outcomes are anticipated at the end of the training. By knowing where you want to go, you can better map the route to get you there.
2. When planning, it is important to determine how much time can be allotted for the training, and whether you will have an adequate amount of time to do what needs to be accomplished. Consider expanding the time for the training if needed.
3. You will want to take into consideration a variety of factors when it comes to managing your training space. First, determine if the meeting will be face-to-face, virtual, or both. You will need to ensure that either a physical or virtual meeting space is conducive to producing the intended outcomes and ensure that you have adequate resources such as flipcharts, markers, and other supplies.
4. **Attachments** – The following attachments are attached for the meeting: IDT Training Documents, Basic templates for an Agenda, Discussion Log, Follow-Up Item Log, and Meeting Feedback.

What Makes a Good Facilitator?

1. They are quick thinkers. Good facilitators are required to keep track of assorted items simultaneously: timing, questions, and outstanding issues to be addressed.
2. Good facilitators make their work look effortless and natural, but advance preparation is key. Preparation involves determining the desired or intended outcomes of the training. You must decide what methods and tools will most efficiently and effectively assist in achieving those outcomes.

Plan and distribute the agenda.

The meeting agenda is the document that defines what will be accomplished at any event, and it helps both leaders and participants know what to expect, and how to prepare. An agenda should include the date, time, location, any call-in or log-in details, and a list of the items to be accomplished. If possible, distribute the agenda in advance, but, at a minimum, review the agenda at the beginning of your training event. You may want to consider using [Attachment A – Agenda](#) (pg. 10). as a basis from which to build your full training agenda.

Greet your members.

A good facilitator prepares to engage with the trainees by greeting members at the door, or as they log-on to a tele/video conference. You are setting the tone for the event.

Ground rules help participants establish appropriate ways to interact with each other during training. In any event, it is okay to review ground rules at each training – particularly those around coordination such as silencing cell phones, muting phone lines for telephone participants, and curbing side conversations. **Common Ground Rules:**

- Be here – participate!
- Stay focused.
- We respect one another.
- Only one person talking at a time.

Guide the group in presenting and sharing information during the training activities.

Keeping all team members involved includes giving them the opportunity to be actively involved in the learning, sharing, and collaboration process.

Keep the discussion focused on the specific content.

It is easy to understand how difficult it is to stay on target sometimes, however, it is your task to ensure this happens. If you notice the conversation heading in a direction that will not get you to your end goal, re-focus by asking probing questions or using a “parking lot” for ideas that warrant exploration at another time.

Handle conflict in a sensitive and appropriate manner.

This includes steering members to dialogue, not debate. In a debate, participants try to convince others that they are right, and they attempt to bring the team around to their side. In

a dialogue, participants try to understand each other and increase their learning by sharing experiences and listening to each other actively. Productive inquiry often produces tension, and your job is to ensure that tensions are managed, and that it produces results, not lingering discord.

Identify and intervene if a group member is acting inappropriately.

Sometimes individuals engage in behaviour that has been prohibited, such as trying to control (lead) the group or being disrespectful to other participants. Group norms and ground rules are often self-regulating, but if behaviour is inappropriate, it needs to be re-directed. If the behaviour is particularly out of hand, or if the participant continues to exhibit the difficult behaviour, the facilitator may need to consult with the disruptive member “offline.”

Direct questions, misperceptions, or misinformation to the right people.

You might be able to address questions, misperceptions, or misinformation, but it is best to phrase the response as a question to another staff trainer. You might also put the question to the group for clarification or discussion.

Paraphrase and summarize the training discussion.

This includes documenting ideas for the group to review on a flipchart or a white board. If you are documenting, it is important to get down all the ideas or points. By documenting everyone’s point, you validate their participation if not their point of view. You can also use a simple log to document a running discussion. Consider having your note taker use the [Attachment B – Discussion Log](#) (pg. 11), to capture all the discussion items.

Provide closure and reiterate action items.

As part of assuring that all ideas and points are captured accurately, it is also the role of the facilitator to ensure they have been noted, and that follow-up on the item(s) is assigned to someone. Consider using [Attachment C – Follow-Up Item Log](#) (pg. 12), to track items particularly over time.

Solicit feedback on the training events.

You should conduct both informal and formal assessments to get a sense of what people are feeling. In longer meetings or events, do a “touch-base” with members to determine if they are still satisfied with the ground rules, the agenda, and the tempo and tone of the meeting. Additionally, you may want to use the template in [Attachment D – Training Feedback \(pg. 13\)](#), to do an end-training process evaluation.

What Do I Do? Some Trouble-Shooting Tips

As a facilitator, you may be required to provide intervention to keep the event on track and obtain optimal productivity. Listed below are some tips for intervening circumstances.

1. **Staying on-task and on-time.** With groups are enthusiastic and knowledgeable people, it is easy to veer off onto other topics or easily get side-tracked by minute details of a conversation. To help the group, stay focused, you may want to:
2. **Remind the group of the “keep focused” ground rule.** Suggest that pertinent items that were discussed during the training be noted and addressed later. You may want to use the template [Attachment F – Meeting Logistics](#) (pg. 15).

Dealing with unproductive behaviour

Difficult behaviour is often unintentional or stems from an emotionally charged situation. You might be dealing with inattentive members who are engaging in behaviour that is not productive for or even disruptive to the meeting. You might also be dealing with personal agendas or disrespectful behaviour. Progressive intervention will most often assist you in dealing with behaviour that does not help the community progress toward meeting its goals or objectives.

1. **Use gentle and appropriate humour for redirection.** Depending on the tone of the training event, it may be appropriate to use humour to redirect an individual or the community. This calls attention to the situation but acknowledges that the behaviour may be unintentional. By making light of the behaviour, you can remind the group of the ground rules without over-emphasizing the problem.
2. **Restate the ground rules directly.** If there is one individual or a small group who is exhibiting inappropriate behaviour, make eye contact and note, “Our ground rules state that ...we will have one conversation at a time, we welcome all ideas, we will place these types of items on an agenda and address them at a later date.”
3. **Seek help from the group.** Particularly when a group has established norms and mores, the group can help regulate itself. Do not be afraid to turn to the group for some assistance. You might want to say: “How can we help Bob with this issue?” or “How does the group at large feel about Jane’s comments?” or “Does anyone have an experience similar to Ben’s?”
4. **Address the issue at a break or offline.** Being direct and honest with the individual is the best way to deal with problematic behaviour. You may want to enlist the help of other leaders. You can deal with the person at a break or in-between meetings. You might want to say: “I am concerned that your method for surfacing issues is not helping move the training agenda forward, is there some way that we can help you address this issue without it being a focus of our meeting.”

References

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For in-depth insight into facilitation methods, consider visiting The International Association of Facilitators (IAF) at <http://www.iaf-world.org/>.

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Attachment A - Agenda

1.2 Training Title / Purpose

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1.3 Logistics

Date:		Time:	
Location:		Training Details:	

Training Materials Required

<ul style="list-style-type: none"> ▪ ▪ ▪

Participants

Facilitator:		Note taker:	
Invitees:		Other:	
Trainees:			
Objectives:	<ul style="list-style-type: none"> ▪ ▪ ▪ 		

Agenda Topics	Time	Lead
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Attachment B – Discussion Log

Speaker	Time	Discussion Points	Responses	
			Respondent	Discussion
		<ul style="list-style-type: none"> ▪ ▪ ▪ 	1.	<ul style="list-style-type: none"> ▪ ▪ ▪
			2.	<ul style="list-style-type: none"> ▪ ▪ ▪
			3.	<ul style="list-style-type: none"> ▪ ▪ ▪
		<ul style="list-style-type: none"> ▪ ▪ ▪ 	1.	<ul style="list-style-type: none"> ▪ ▪ ▪
			2.	<ul style="list-style-type: none"> ▪ ▪ ▪
			3.	<ul style="list-style-type: none"> ▪ ▪ ▪
		<ul style="list-style-type: none"> ▪ ▪ ▪ 	1.	<ul style="list-style-type: none"> ▪ ▪ ▪
			2.	<ul style="list-style-type: none"> ▪ ▪ ▪
			3.	<ul style="list-style-type: none"> ▪ ▪ ▪

Attachment C – Follow-Up Item Log

Action Item Description	Priority (H/M/L)	Date Added	Assigned To	Date Due	Status	Comments

Attachment D – Training Feedback :
1=Excellent, 2=Good, 3=Average, 4=Fair

Discussion or Activity 1	
Name of Activity _____ <i>Facilitator's Name</i> _____	1 2 3 4
The time allotted for the activity was...	<input type="checkbox"/> Too much <input type="checkbox"/> Exactly right <input type="checkbox"/> Not enough
The activity provided....	<input type="checkbox"/> Strongly Agree <input type="checkbox"/> Agree <input type="checkbox"/> Disagree <input type="checkbox"/> Strongly Disagree
Discussion or Activity 2	
Name of Activity _____ <i>Facilitator's Name</i> _____	1 2 3 4
The time allotted for the activity was...	<input type="checkbox"/> Too much <input type="checkbox"/> Right <input type="checkbox"/> Not enough
The activity provided...	<input type="checkbox"/> Strongly Agree <input type="checkbox"/> Agree <input type="checkbox"/> Disagree <input type="checkbox"/> Strongly Disagree

Attachment E- Working Group Session:

1=Strongly Agree, 2=Agree, 3=Disagree, 4=Strongly Disagree

Working Group Session	
<p><i>Facilitator's Name</i> _____</p> <p>The facilitator managed the session well.</p>	<input type="checkbox"/> Strongly Agree <input type="checkbox"/> Agree <input type="checkbox"/> Disagree <input type="checkbox"/> Strongly Disagree
<p>Our group met the goal of our session.</p>	<input type="checkbox"/> Strongly Agree <input type="checkbox"/> Agree <input type="checkbox"/> Disagree <input type="checkbox"/> Strongly Disagree
<p>My input was valued.</p>	<input type="checkbox"/> Strongly Agree <input type="checkbox"/> Agree <input type="checkbox"/> Disagree <input type="checkbox"/> Strongly Disagree
<p>My expertise was appropriate to contribute to this discussion.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Somewhat
<p>The time allotted for this session was...</p>	<input type="checkbox"/> Too much <input type="checkbox"/> Just Right <input type="checkbox"/> Not enough

Attachment F – Meeting Logistics:
Please choose the appropriate response.

Meeting Logistics		
	Yes	No
Were there enough breaks?	<input type="checkbox"/>	<input type="checkbox"/>
Was the meeting run on-time?	<input type="checkbox"/>	<input type="checkbox"/>
Did the room arrangement facilitate discussion?	<input type="checkbox"/>	<input type="checkbox"/>
Were you provided with all the needed materials?	<input type="checkbox"/>	<input type="checkbox"/>
What did you like best about the meeting?		
What did you like least about the meeting?		
Additional Comments:		

Institute for Training and Development

Performance Objectives

1. Apply self-awareness concepts that will build productive employee relationships, self-governance, and accountability.
2. Analyse how self-awareness and empathy are interconnected: self-awareness increases empathy, which in turn, helps people build better relationship.

Personality Assessment Training

Research based Personality Assessment Training that will raise self-awareness and empathy was implemented for the training. The assessments are not computer based; they are direct activities that require group participation.

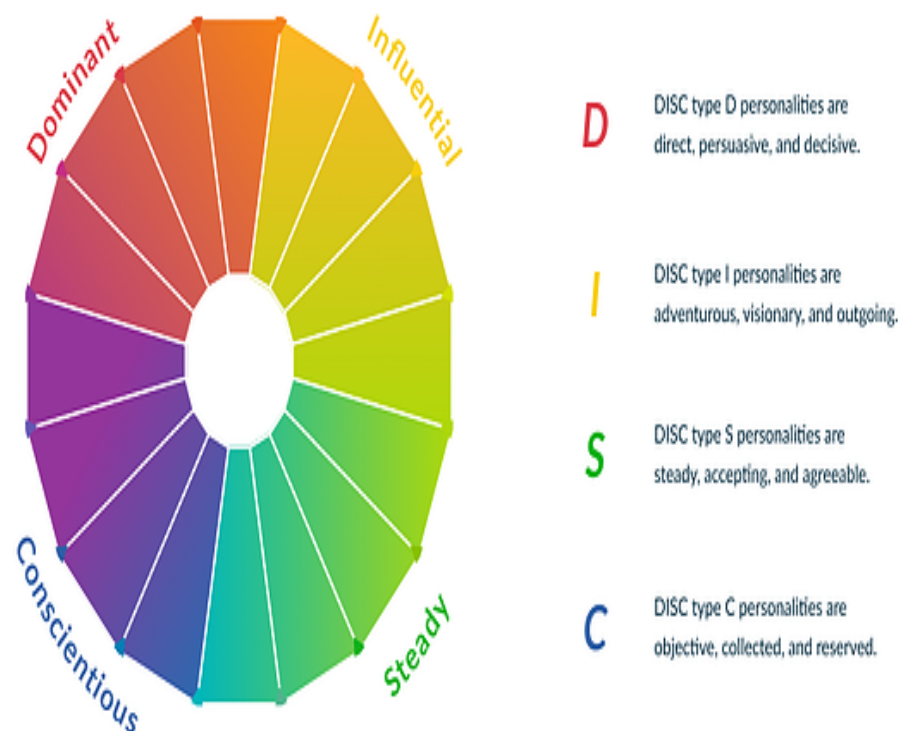
Personality Tests *create self-awareness among team members*. This self-assessment provides insight into one's desires, strengths and weaknesses, emotional triggers, and routines of which we or not cognizant of. The test determines how each employee makes decisions, and it will reveal each employee's unique temperament and behaviourism.

In addition, the activities will also give the team the opportunity to engage and learn about each other. The personality tests are an innovative way to promote team collaboration. It promotes productivity, increases motivation, and builds reliance and esteem among teams.

What is the DiSC Assessment?

The first DiSC assessment was created in 1956 by Walter Clarke, an industrial psychologist. Clarke's model was originally designed for use in businesses to help them choose qualified employees. Clarke also renamed the four factors to Dominance, Influence, Steadiness and Conscientiousness (truity.com).

The DiSC assessment is one of the most popular personality assessments available today. It is used by over one million individuals, businesses and organizations every year to help people find their ideal career, team up with the right people, and improve communication and productivity in the workplace. The DISC personality assessment describes some of the most fundamental differences between individuals, so it is powerful in terms of understanding why people do what they do — and then using this knowledge to reduce conflict and improve working relationships (truity.com).



Self-Awareness Training Activity: (DiSC) Share Your Personality

The Share Your Personality activity will give the team an opportunity to understand each other a little more:

Training for: ITD Staff

People required: ITD Staff

Time: 45 minutes (each session)

How it works:

1. The group will fill out a team building personality test (DISC). [See Attachment “G \(DiSC Personality Test \(pg.19\).](#)

Activity 1: Self-Awareness DiSC Exercise

The first step in communicating effectively with others is understanding your communication styles and tendencies. Teams must learn how to read their DISC reports--there is no right or wrong way to do this. Go through each section or pick out the most relevant ones to discuss. Have team members highlight areas that resonate with them, most to revisit later or circle sections that they feel are not entirely accurate. Have an open discussion at the end to ensure that everyone understands their reports and behavioural styles, and how they differ or are like one another.

Activity 2: Identifying others' DISC type exercise

Once participants have a solid understanding of their DISC type, it is essential to give them the tools to identify the personalities of others. A broad overview of each personality type, including main traits and characteristics, communication styles, and outward expressions, will help your team better understand the personalities of their colleagues or peers.

Once you have gone over all the styles (DiSC), provide or read aloud a short paragraph describing a make-believe person and their characteristics. Ideas include public figures, movie, or book characters, or just a completely made-up person by you. Have team members try to identify the personality type of the person you are describing. Ask which traits lead them to their decisions.

Attachment G –DiSC Personality Worksheet

DISC Personality Test

For each row, circle the personality trait that describes you best. For each column, count the no. of circles in the column and put the total score at the bottom of the column.

1	Strong-Willed	Persuasive	Kind	Humble
2	Independent	Sociable	Pleasant	Cooperative
3	Bold	Lively	Loyal	Passive
4	Competitive	Cheerful	Obliging	Open-minded
5	Daring	Humorous	Calm	Precise
6	Pioneering	Trusting	Lenient	Tolerant
7	Persistent	Entertaining	Obedient	Neat
8	Energetic	Sociable	Lenient	Peaceful
9	Risk Taker	Good-mixer	Patient	Precise
10	Determined	Energetic	Self-controlled	Systematic
11	Aggressive	Charismatic	Good-natured	Careful
12	Restless	Talkative	Controlled	Conventional
13	Decisive	Popular	Neighbourly	Organized

Attachment H – DiSC Facilitator Worksheet

DISC Facilitator Worksheet

The results of the DISC Personality Test will tell you the various degrees of each personality trait you have.

D(Dominant)

If you have most of your checks on the first column, then you are a D (dominant) person.

A dominant person generally is a direct, positive, and straightforward person. This person must be in charge, do things fast, and want immediate results for their efforts. They are determined, independent, like to solve problems, and face challenges. They are task oriented, and they would step on some toes along the way.

People who belong to this category are the sales superstars and the strong entrepreneurial leaders. They are people you want to have around in your organization. They are very results oriented, and you can expect to see things getting done efficiently. They have extremely low patience, and you must continually engage them to keep them in the organization.

This person will remain with you if they feel this will help them achieve their personal goals. Be careful about putting two Ds in the same team, conflict will always arise between two strong-willed individuals.

I(Influential)

If you have most of your checks in the second column, you are an I (influential).

An influential person is a very people-oriented person. They are friendly, outgoing, sociable, and they often are around friends. They define themselves by their relationships, and they thrive on social contact. They can get along well with most people because they are generally interested in people.

These people are important in an organization because they bring the human touch to the organization. They will make new hires within your organization feel welcome.

However, these people are not particularly good at doing tasks well; they are less meticulous, and would miss certain details in their work. Learn to use these people accordingly because while they may not perform certain tasks well, they are essential to building an relationship-based organization.

S(Steady)

If you have most of your checks in the third column, you are an S (steady).

Steady individuals generally thrive supporting a D(dominant) leader and doing the work behind the scenes.

These people are loyal, have good self-control, often good listeners, and want to avoid disagreements and conflicts.

They are essential to an organization because you need people who can be supportive and loyal to your organization. Not everyone can be the one to receive the honor, not everyone can be the head of a team or an organization, but the S(steady) individuals are typically happy where they are. That is why S(steady) people are absolutely essential for any team to work.

S(steady) personalities generally work well in support roles like managerial roles, or as assistants to heads of departments.

C(Conscientious)

If you have most of your checks in the fourth column, you are an C(conscientious).

Conscientious people are extremely useful in any organization; they are precise and called to detail. They are systematic people, and they need a lot of information when performing a project. They are like the S(steady) people, and they would choose to avoid conflict and tend to be more accommodating to others.

When you are planning something in your organization, you need conscientious people to be around to assist you. Sometimes they are able to see things that you cannot, and have foresight about particular events or scenarios that might arise.