Inspiring leaders to
improve children's lives

National College
for School Leadership

Schools and academies

Facilitator toolkit

Resource

Contents

Section 1: Purposes and intents

The National College for Leadership of Schools and Children's Services (National College) works to make a difference to children's lives through excellent school and academy leadership, growing and supporting current and future leaders so that they can have a positive impact within and beyond their schools.

National College goals

- Develop excellent school leadership to transform children's achievement and wellbeing.
- Develop leadership within and beyond the school.
- Identify and grow tomorrow's leaders.
- Ensure a fit-for-purpose National College.

This document provides associates and facilitators with planning guidance and examples of simple techniques and tools to facilitate adult learning.

Adult learning and models of learning

This document is underpinned by a number of models of learning. These provide the basis for meaningful dialogue about the learning process and its related outcomes. These refer to the learning terms shallow, deep and profound learning, they are key in understanding the process of how people learn.

Learning models and protocols

The kind of talking needed to educate ourselves cannot arise spontaneously and unaided from just talking. It needs to be carefully planned and scaffolded.

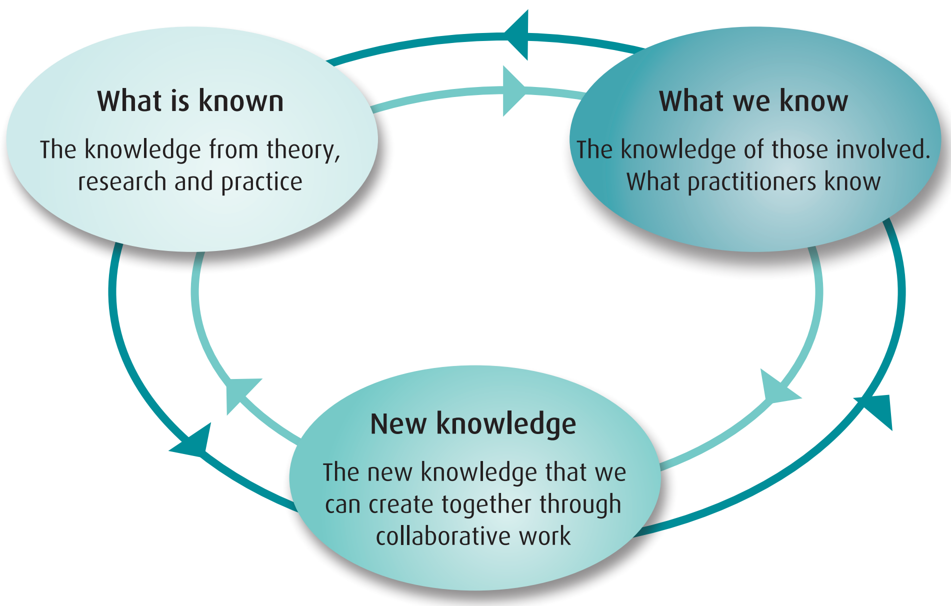
McDonald et al, 2003

Protocols aim to scaffold learning of three types:

- additional learning: adding to what is already known
- adaptive learning: reshaping what is known and understood
- creative or innovative learning: discovering new meaning, or new ways of understanding and action

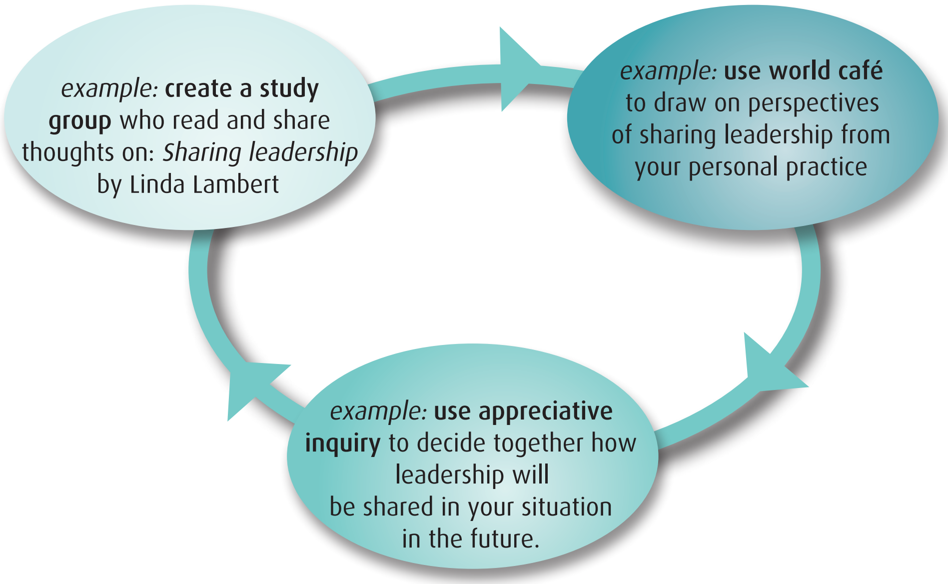
In order to enable these different types of learning to take place, a facilitator will use protocols to develop what participants already know, to make public knowledge available to them and to ensure that the collaborative construction of different meanings, understandings and interpretations bring about the creation of new collective knowledge *(Figure 1)*.

Figure 1: Three fields of knowledge



Within the model of learning shown in *Figure 2*, the three fields of knowledge are utilised in a dynamic relationship with one another through network-based activity, application and study within classrooms. An example of what this looks like in practice is given in *Figure 2*.

Figure 2: Three fields of knowledge: example



There is more detail on the model shown in *Figure 1* in Appendix 1.

See also *Appendix 1* of National College, 2006, *What are we learning about...? Facilitation in school networks,* Nottingham, NCSL.

Section 2: Planning for learning

Planning for adult learning at events and through activities

Learning is messy, uncontrollable and natural. If we are to improve practice in any significant way we need to focus our learning and use our opportunities for learning to the full.

When engaging with your cluster, it is important to aim to provide opportunities for learning across the phases in *Figure 3.*

Preparation phase

Figure 3: Phases of the MLDP

Who are the participants in the learning activity or training you are planning?	– What do you know about your participants? – What is the group expecting of this event or activity? – What experience and prior knowledge does the group have in this subject area? – What is the mix of group? What roles, school phases, regions and local authorities are represented? – How does this affect your plans? – Do the members of the group know each other? – How big is the group?
What are the learning outcomes for the learning activity or training you are planning?	– What is the group anticipating will be the outcomes? – Are you determining the learning outcomes from the event or activities or, in the case of a bespoke event, have these been made explicit by others? – What opportunities are there for participants to continue the learning beyond the event or activity?

Where will your learning activity take place and what resources do you have at your disposal?	– Time? – Venue restrictions? – Room layout? – Resources available? – People available? – Admin? – Facilitators? – Timing of breaks?
How will you evaluate the learning activity or training you are planning?	– What was the participants' learning? – What was the quality of facilitation? – What are the lessons for or future actions and outcomes?

Planning phase

It may be helpful to follow a step-by-step approach to planning a learning activity or event. The model in *Figure 4,* based on Glaser's (1990), is intended as a guide. Glaser expanded Kolb's learning model by showing how the cycle could be used to underpin the design and facilitation of a learning programme.

Glaser's model:

- increases the number of steps
- describes what facilitators do during each step in the cycle

The steps in Glaser's development of the experiential learning cycle are described below, but have been adapted to the context of planning events and activities rather than a whole learning programme.

Please note: This approach need not be followed in its entirety but it may stimulate your thoughts about the structure of workshops and learning activities.

See examples in resources section.

See form in resources section – structuring in your session.

Figure 4: Seven steps in planning a learning activity or event

Step 1	**Warming up and getting the group on track** This step helps participants leave behind the day job and focus on learning. It can often be incorporated into a warm-up. It can help to clarify a shared understanding of what the event or activity is for between facilitator and participants.	**Focusing**	**Examples** – Ice breakers (see A to Z) – Sharing aspirations for the day – Speed dating around a key question
Step 2	**Giving the group a structured learning experience** This is usually a group activity during which participants engage with concrete examples of the concepts or area of learning. It allows participants to identify what they already know about the theme or topic.	**Experiencing**	**Examples** – Case studies (written or presented) – Postcards summarising case studies – Video – Games – Simulations
Step 3	**Processing** This is usually a fairly short step as participants reflect on their prior knowledge in discussion with others. Often they are asked to identify common areas of understanding or to categorise their thinking in some way.	**Reflecting**	**Examples** – Small groups identifying three common areas of understanding from their discussion – Categorisation activities (see A to Z)
Step 4	**New knowledge and theory input** Relevant theory is introduced. This is often a presentation but it could also be a video or a piece of written material to consider.	**Thinking**	**Examples** – PowerPoint presentation – Think pieces – Mantle of the expert

Step			
Step 5	**Assimilating knowledge** At this point the participants consider their existing knowledge alongside the theoretical input. This very often creates much discussion (especially if the input has been interesting, thought-provoking and well presented).	**Modifying**	**Examples** – Enablers and barriers – Using base boards to sort and categorise ideas – Diamond nine – Futuring activities
Step 6	**Application** Crucially the learning so far has to be placed back in context for the participants. This step requires them to consider the implications for them, others they work with and their organisations.	**Applying**	**Examples** – Scenario-planning – Carousels – Coaching
Step 7	**Summarising** This step helps participants capture the key learning points for them and consider their next steps. It may also contribute to the evaluation of the event or activity.	**Integrating**	**Examples** – Pentagon review sheet (see Resources)

Adapted from Glaser, R, 1990, *Designing and facilitating adult learning,* Organisation Design and Development Inc.

By following the experiential learning cycle, the facilitator and participants are guided through a series of processes that will appeal to the range of learning preferences likely to be found in the leadership context, hence increasing the likelihood that learning will take place.

Another useful starting point is to consider some principles of adult learning and then reflect on how learning activities and events could be designed to adhere to these principles. *Figure 5* attempts to do just this and is a useful checklist to consider when reviewing the plans for an event or activity.

Figure 5: Checklist of learning principles and their implications for training

Learning principles	Implications for the design of training activities
The adult is in partnership with the instructor in the learning process.	Participants should actively influence the learning approach.
Adults are capable of taking responsibility for their own learning.	Incorporate self-directed learning activities in the design.
Adult learners gain through two-way communication.	Avoid overuse of lectures and talking-to and emphasise discussion instead.
Adults learn through reflection on their and others' experience.	Use interactive methods such as case studies, hot seats, etc.
Adults learn what they perceive to be useful in their life situations.	Make the content and materials closely fit assessed needs.
Adults' attention spans are a function of their interest in the experience.	Allow plenty of time to process the learning activities.
Adults are most receptive to instructions that are clearly related to problems they face daily.	Include application planning in each learning activity.

Learning principles	Implications for the design of training activities
Adults learn best when they are being treated with respect.	Promote enquiry into problems and affirm the experience of participants.
Adults do not always see themselves as learners.	Give participants a reason for becoming involved and provide opportunities for success.
Adults learn better in a climate that is informal and personal.	Promote getting acquainted and interpersonal links.
Adult learners apply learning that they have been influential in planning.	Diagnose and prioritise learning needs and preferences during the course as well as beforehand.
Adults learn when they feel supported to experiment with new ideas and skills.	Use learning groups as home bases for participants.
Adults are likely to have somewhat fixed points of view that make them closed to new ways of thinking and behaving.	Include interpersonal feedback exercises and opportunities to experiment.
Adults learn to react to the differential status of members of the group.	Use sub-groups to provide safety and readiness to engage in open interchange.
Adults are internally motivated to develop increased effectiveness.	Make all learner evaluation self-directed.
Adults filter their learning through their value systems.	Provide activities that focus on cognitive, affective and behavioural change.

A cautionary note: seven deadly sins facilitators may adopt

First deadly sin: inadequate or no planning

How many times have you been asked to do a session but received little or no information about the problems, the participants, or the outcomes desired? And because you are so eager to make a contribution, you don't ask questions or insist on defining the problems the training is supposed to solve. This year, let's resolve to do a thorough needs analysis before we start the training – even if we run the risk of exasperating a few powerful people.

Second deadly sin: ignoring established principles of adult learning

Let's agree that we will not make programmes that are predominately lecture oriented, that we will not train when people are seated in rows facing us, and that we will not ignore our participants as resources to the learning process. By now we should all be familiar with what helps adults to learn. Let's put these principles into practice in our classes and courses for the coming year.

Third deadly sin: letting video carry the learning

Okay, using well-placed video now and then can make some sense. But too often, we expect video to do the work for us. Sure, we can relax while our participants watch the screen instead of interacting with each other. But how much learning is really taking place? While videos can be well done and helpful learning tools, eventually our participants need to define problems, do some critical thinking, and commit themselves to action.

Fourth deadly sin: presenting training of low relevance to our participants

We all know how expensive training is to our organisation. Sometimes we fail to make sure that the training we're presenting is clearly related to the problems our participants face. When our training is not relevant, we run the risk of boring our participants and diluting the impact of the learning training is meant to produce. From a practical point of view, this means constantly testing our content for its worth to our participants in solving organisational problems.

Fifth deadly sin: staying at too high a level on the ladder of abstraction

Many trainers love theory. Some participants love theory, too. The trouble is the theory may not be connected to the problems faced by our participants. We need to find real examples from our organisation. Stuff that our participants can relate to. This takes research and persistence, but the lower on the ladder of abstraction you remain, the more relevant your training becomes.

Sixth deadly sin: forgetting to help participants transfer their learning back to their jobs

As trainers we may be making the assumption that our participants will connect classroom learning to their work. Maybe it will happen, maybe it won't. As trainers it's up to us to create a place for participants to make the connections. This means that what we teach or facilitate must be explicitly connected to work problems if we expect transfer of learning to take place.

Seventh deadly sin: settling for 'smile' evaluations from our participants

We all do it. We ask our participants in various ways, 'How did you like the course?' 'Rate the instructor on a scale from one to five'. And so on. We all know that our organisations expect much more from their training/learning investment, such as 'What changes occurred in output as a result of the training?' This year, let's take the time to really get a handle on evaluation instead of settling for a round of applause.

Adapted from Glaser

Figure 6: Facilitator or trainer: both roles are valid but what's the difference?

Facilitator

- leader of discussion
- co-ordinator of activities
- shaper of group norms
- provider of feedback
- reflector of questions back to group for consideration
- structures expectations and objectives with the group
- builder of group processes and relationships between members
- structures environment with the group
- negotiates areas of focus, scheduling and pacing
- encourages group application of concepts and skills

Facilitators do:

- structure programme activities
- co-ordinate exercises
- stimulate discussion
- ask questions
- clarify key points
- guide problem-solving
- support participants during confusion and doubt
- reflect, expand and summarise participant comments

VS

Trainer

- presenter of information
- director of assignments
- enforcer of rules
- evaluator of answers
- provider of answers
- structures expectations and objectives for the group
- creator of teacher student relationships
- structures environment for the group
- dictates areas of focus, scheduling and pacing
- directs application of concepts and skills

Trainers do:

- present themselves as the experts
- direct and maintain constant control
- evaluate and judge
- solve problems for others
- spend most of the time talking

Section 3: Tools and techniques for facilitating adult learning

A to Z with protocols The following table provides you with an overview of facilitation techniques and tools detailed in the following section of the document.

	Approx time (mins)	Level of difficulty to organise (red/amber/green)	Good for large groups?	Fewer than 30 in a group?	Good for table conversations up to 20 minutes?
Action learning	30 – 60	amber	no	yes	yes
Appreciative inquiry	45	red	no	yes	yes
Brainstorming	15 – 60	green	yes	yes	yes
Categorising	15 – 60	green	yes	yes	yes
Collage/visualisation	45 – 60	red	no	yes	no
Critical incident review	15 per person	amber	no	yes	yes
Diamond nine	20 – 30	red	no	yes	yes
Dotocracy	15 – 20	green	yes	yes	yes
Five whys	15 – 30	green	yes	yes	yes
Fishbone analysis	20 – 30	amber	no	yes	yes
Force field analysis	20 – 30	green	yes	yes	yes
Futuring	20 – 30	green	yes	yes	yes
Icebreakers	15 – 30	green	yes	yes	yes
Learning conversations	45 – 60	amber	yes	yes	yes
Photo-language	30 – 60	red	yes	yes	yes
Prioritisation matrix	30 – 60	green	no	yes	yes
Problem-solving team-building (PSTB)	30 – 60	amber	no	yes	yes
Spidergram	30 – 120	green	yes	yes	yes
SWOT analysis	30 – 60	green	no	yes	yes
Talking walls	15 – 45	amber	yes	yes	yes
Think pieces	15 – 45	red	yes	yes	yes
Think, feel, say, do	10 – 60	green	no	yes	yes
Vernissage	30 – 60	amber	no	yes	yes
What's working?	40 – 60	green	no	yes	yes
World café	45 – 60	amber	yes	yes	no

Notes

- When using the majority of these tools, facilitation is very important to draw out the learning and keep groups on task and on time.
- With some activities for ‘fewer than 30’ or ‘table conversation’, the group may need divide into smaller working groups.

Tool	Action learning
In brief	**Invented by Reg Revans in the 1980s for use in the coal industry, action learning is a process of enquiry. It starts with the identification of a real problem or issue, and a group of learners then comes together to find solutions.**
Use	**Problem-solving and collaborative enquiry** Action learning allows theory, practice and experience to combine effectively. It provides a very real context for learning and often creates very tangible outputs.
How to run it	One person acts a facilitator or adviser for each group. A group might typically be between three and five people. The group establishes a trusting and confidential atmosphere in which it is safe to share difficult issues. Individuals take it in turns to describe one or more real, personal or organisational issues that they are currently struggling with. The group then decides which one (or more) of these the group would like to tackle. In some cases the combined group expertise will be enough to provide useful answers to individual issues, but often a process of collaborative inquiry is called for. Divide larger groups into smaller sub-groups.
Top tips	1. Make sure the time is divided equally among the members of a group so that everyone's problems can be discussed. 2. Encourage individuals to share real (not superficial) problems which they genuinely want to solve. 3. Discourage participants from offering solutions or answers to other people's problems and encourage them to reflect and explore, allowing the person who presented the issue to draw his or her own conclusions.

Tool	Appreciative inquiry
In brief	**Appreciative inquiry (AI) is a radically alternative approach to organisational change. If the thinking behind traditional change management strategies can be summarised as, 'Let's look for the problems around here and fix them', an AI approach would be 'Let's find out what's already working around here and allow these positive experiences to influence the rest of the organisation. It is based, in summary, on the idea that 'if you talk about negative stuff, that's where people's energy will go'.**
Use	**Spreading good practice and positive influences** The assumption of AI is that there are already lots of good things going on in most organisations but because it's ad hoc and unrecognised, it has little influence. AI brings these positive influences out into the open in the form of stories that can be shared and whose positive influence can spread in a viral way.
How to run it	The overall process used is called the appreciative inquiry **4-D** cycle: **D**iscovery: begin by looking for what is working. You **appreciate** the best of your experience. This discovery is based on interviews and stories designed to discover strengths. **D**ream: This where you **envision** what might be by creating bold statements that describe ideal possibilities, no holds barred. **D**esign: You start to turn the dream into reality; **codetermine** what should be the ideal, establishing principles and priorities. **D**estiny: You take sustained action to **innovate** in order to create what will be
Top tips	In Sue Annis Hammond's *The Thin Book of Appreciative Inquiry* she talks of the eight assumptions of AI: **1.** In every society or organisation, something works. **2.** What we focus on becomes our reality. **3.** Reality is created in the moment, and there are multiple realities. **4.** The act of asking questions of an organisation or group influences the group in the same way. **5.** People have more confidence and comfort to journey to the future (the unknown) when they carry forward parts of the past (the known). **6.** If we carry parts of the past forward, they should be what are best about the past. **7.** It is important to value differences. **8.** The language we use creates our reality.

Tool	Brainstorming
In brief	**Created by Alex Osborn working in a New York advertising agency in the 1950s, brainstorming involves a group of people generating ideas about a given topic. As ideas are generated, they are written down, without anyone judging them and without stopping to explore them. The aim is to create as many ideas as possible in as free an atmosphere as possible on the assumption that some of the ideas will be worthwhile.**
Use	**Ideas-generation; problem-solving** **1.** Brainstorming is a means of generating lots of ideas. **2.** It provides a framework in which it is acceptable to think out of the box without fear of being put down. **3.** Evidence suggests that the frame of mind of the participants and the culture in which the brainstorming takes place are important factors in determining the quality of the ideas produced.
How to run it	The group's leader encourages members to contribute ideas and these are written on a flip chart or captured electronically. Each contribution is acknowledged. No judgements are offered as ideas are shared and all suggestions, however wacky, are accepted. After an agreed time, the brainstorming stops and ideas are looked at carefully. Large groups can be divided for more interaction.
Top tips	**1.** Start the session with a moment of quiet thought, allowing less confident members to make a few notes. **2.** Ensure that everyone is encouraged to contribute. **3.** Urge people to keep going when they seem to have run out of steam; they may really have to think. **4.** Look carefully at the ideas that you produce towards the end of a session rather than at the beginning. **5.** Spend as long looking at what you have produced critically as you do generating the ideas in the first place. **6.** Try some of the variations suggested in the **categorising tool.**

Tool	Categorising
In brief	**Created by Alex Osborn working in a New York advertising agency in the 1950s, brainstorming involves a group of people generating ideas about a given topic. As ideas are generated, they are written down, without anyone judging them and without stopping to explore them. The aim is to create as many ideas as possible in as free an atmosphere as possible on the assumption that some of the ideas will be worthwhile.**
How to run it	Testing hypotheses; evaluating different courses of action Categorising helps you to: – make connections – organisation data economically – see the bigger picture – transfer knowledge effectively
Top tips	There are a few ways of categorising and structuring: 1. **Columns.** One of the simplest ways of organising data is to split it into two. Some possible headings you might like to use include: More than/Less of Like/Dislike Positive/Negative 2. **Alphabet categories.** How many items you can think of beginning with each letter of the alphabet? You can take ideas from a brainstorming session and use the alphabet discipline. 3. **Plus, minus, interesting.** This is an idea from Edward De Bono which encourages creative categorisation of ideas. Under this heading, ideas that just might have some merit tend to be better scrutinised and not instantly rejected. Encourage participants to investigate the 'interesting' column especially carefully. Three columns are now needed: Plus Minus Interesting. 4. **Learning from Amazon.** Think of the way books are categorised by the internet bookseller Amazon. You can see them according to their popularity (the ranking system), and there is also a star rating system. When you select a book you can see other books by the same author and read the opinions of others on the book. 5. **Mad, sad and glad.** You can also ask people to categorise themselves. When you are talking about contentious issues it is sometimes helpful to deal with the feelings they provoke. Divide the tables into three different types, Mad (ie, angry), Sad and Glad. Put large self-supporting pieces of card on each table to show which is which and invite participants to gather at the appropriate table to give vent to their feelings. Conduct a plenary session in which you capture the key points on a flip chart, whiteboard or computer under the three headings. The act of undertaking this kind of analysis tends to introduce a sense of perspective for those who felt mad (ie, angry) about the topic. 6. **Mind maps.** Invented by Tony Buzan, these highly visual ways of organising ideas allow a more networked approach to the association of and hierarchies implied by ideas.
Use	1. Keep it simple. 2. Don't overdo it. 3. Think on your feet. There are many variations you can try.

Tool	Collage/visualisation
In brief	**Sometimes words won't work and it is better to resort to pictures. First introduced by Georges Braque and Pablo Picasso in the early 20th century, a collage is an assembly of images that are stuck on to a flat surface.**
Use	**Generating ideas; visioning; expressing feelings** Collage and visualisation encourage a different kind of creativity, allowing less extrovert people to be loud. It encourages free associative thinking and is effective for picturing the future or the ideal, for example you could ask participants to create a collage that represents their idea of the perfect classroom, an effective learner or their current feelings about their school. It is a powerful medium for the expression of ideas or feelings.
How to run it	Resources needed: lots of glossy magazines, a pair of scissors each, paper and glue sticks. The aim is to create collages out of available resources alone, in pairs or in groups. If you start by letting people work singly, then you may like to get individuals to pair up and then pairs to make a four, each time inviting people to say what they make of their collages. The act of collaboratively creating a collage can be used as a means of team-building and offering chances for more informal conversations to take place. A collage (or a picture) can act as a stimulus for a session generating new ideas: What does this make you think about?
Top tips	**1.** Expect this to take longer than you have allowed. **2.** Make sure that the collages can be effectively displayed during the session. **3.** Be prepared to encounter resistance from those who believe that they are not artistically endowed. Reassure them that this is not a test of their artistic ability but a medium for communicating.

Tool	Critical incident review
In brief	**Although we learn all the time, certain episodes in our life may be packed with more meaning than others. The process of critical incident review encourages individuals to:** – **invest more energy in recording and reflecting on their own practice** – **develop a process of extracting meaning from experience by involving fellow professionals**
Use	**Reflection; performance improvement** This is an excellent way of encouraging reflective practice and of enabling participants to come to sessions with material on which they have already begun to reflect.
How to run it	**1.** Participants keep a log or diary of incidents which seem to be important to them in their professional lives, eg key staff performance moments, insights into the learning process, challenging situations with parents etc. Participants develop a set of questions with which they are comfortable to help them reflect on and learn from the incident. **2.** Participants take it in turns to share their incidents in groups of three to five, outlining their own initial thoughts about them. **3.** Listeners comment on what has been said. They might focus on the content, or the way the incident has been described (for example if it has shown disproportionate anger) may lead them to make a remark. They might share their own experiences or give a wider perspective or suggest some development work you might undertake in forms such as 'You might like to...'. Using 'might' not 'should' is important as it leaves it open for the recipient. It really helps if the person being advised can just say 'Thank you', rather than challenging the advice. It helps to build in reflection time. **4.** Participants decide what action to take in the light of the advice they have received from their peers. It is important that this is written down as this act of commitment will make it more likely that it will happen. This activity can be adapted so that it focuses entirely on good news, by encouraging participants to bring to the group examples of things that are going well – one each – to share and comment on in the same way.
Top tips	**1.** It helps if you coach people beforehand in the ways in which they might like to respond to the incidents, especially in the use of 'might' not 'should'. **2.** Encourage everyone to respect their peers by focusing on the incident and not on any personalities involved. **3.** Different incidents will require different amounts of time, so flexibility will be called for. **4.** As with any learning, it will be important for those giving feedback to find positive things to say as well as those that may be more critical.

Tool: Diamond nine

In brief

Prioritisation – the ability to put things into an order of importance – is an essential skill for any team. It is, of course, important to remember that you can prioritise according to many different criteria.

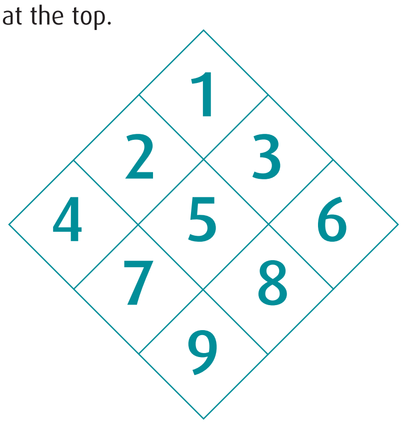
Use

Evaluating ideas; taking decisions

Prioritising creates focus and critical evaluation. Using this method allows small and large groups to prioritise effectively and helps the group to feel ownership for decisions.

How to run it

Invite participants to read a long list of items and reflect individually as to their relative importance. Ask them to create their own ranking of the nine most important items, displayed as a diamond with their most important idea at the top.



Then ask them to get into small groups and explain their decisions. Invite each group to create a common group version. Your role as facilitator is to use the group versions as part of a plenary session to get individuals to explain their reasoning and structure a discussion about the relative merits of different elements. Finally you can see if you can get the whole group to agree on its top one item.

Top tips

1. Sometimes groups will want to avoid the process and jump straight to a ranking. In such cases check that this is not the thinking of one dominant individual by insisting that they go through the process.
2. Allow at least an hour for the diamond 9 activity and expect it to take longer.
3. Given the complexity of the diamond 9 tool, you may not want to use it until the group has acquired a reasonable level of confidence.

Tool	Dotocracy
In brief	**Group discussions usually generate a lot of statements, but it is not always easy to see which ones are considered the most popular. In an ideal world, people would discuss and reword the statements, but with large groups (more than 12 participants), this can be time-consuming. An alternative is to write all the statements on large sheets of paper, and put these sheets of paper on the wall. Next to each statement is a voting space (see diagram below). This is a workforce remodelling tool.**
Use	**Gauging preferences** Sometimes called dot voting, this is a way of quickly gauging participants' preferences.
How to run it	Following an informed discussion a number of options or ideas may have been generated. These will be recorded on a large piece of paper on the wall. Statement 1 Statement 2 Statement 3 Statement 4 Statement 5 .... Voters are each given a number of sticky dots (or felt pens) and asked to put one or more dots on statements they most strongly agree with. Average one dot per voting item. Since the whole purpose of dotocracy is to get people to make choices, the number of dots that each person gets should be calculated to maximise choice. A rule of thumb is that the average item should get about one vote, so the total number of votes should be roughly the number of items to vote on. For example, if there are 30 items to vote on, 30 dots will be shared among the voters. So, if 10 people are voting, everybody gets 3 dots each. That will mean that a lot of items get no dots at all, and the most popular item might get about 20 dots. This is a relatively quick exercise and can be completed within 20 minutes.
Top tips	**1.** If different types of stakeholder are voting (such as parents and students) you can give different coloured dots to each category of person. This will reveal differences in opinion between the different groups. **2.** You can't control the number of dots participants put on each statement, so leave it to the participants to spread their dots around however they like.

Tool

Five whys

In brief

Similar to the fishbone analysis, this tool can help teams understand the underlying causes of problems or issues. It is particularly useful for identifying the root of a problem through consultation when teams are deepening their understanding. This is a workforce remodelling/ school improvement planning framework (SIPF) tool.

Use

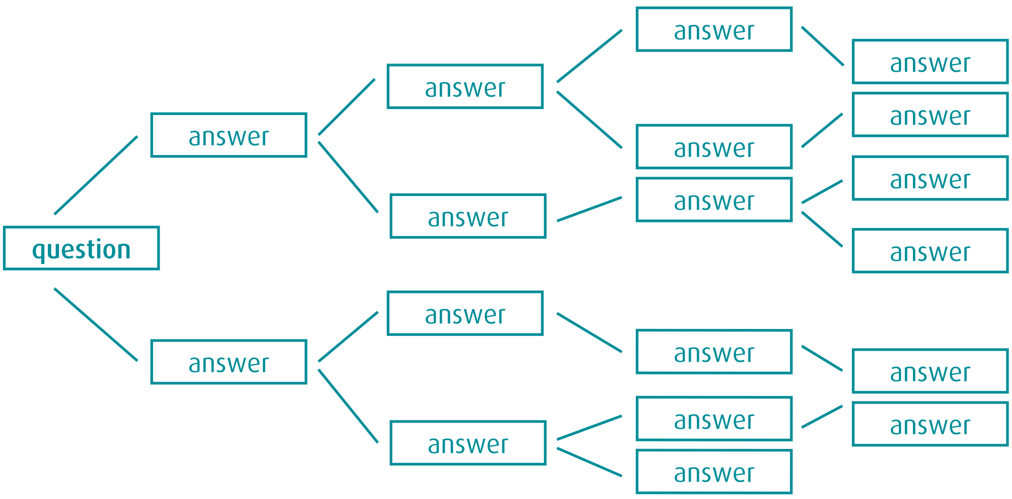
Clarifying problems; focusing on solutions

This technique begins with a clear statement of a problem or issue and then allows teams to interrogate this statement with the question 'Why?'. The tool breaks down large issues into their components, allowing teams to respond with focused actions and initiatives.

This tool is useful to avoid moving into fix-it mode where solutions may address the symptoms rather than the causes of issues.

How to run it

Start by writing a concise statement on the left of a large sheet of paper, move to the right and pose the question 'Why is that?' Capture answers in a succinct phrase, gradually work from left to right as you pose the same question.



Top tips

1. Moving into fix-it mode too quickly might mean dealing with symptoms but leaving the problem unresolved.
2. Try to work each branch of your analysis to five levels or until you reach a root cause and analyse another branch of the issue.

Tool: Fishbone analysis

In brief

This tool gets its name from how it appears when drawn on a large sheet of paper, with a problem statement to one side. A spine extends from this statement with lines branching off it on which the team records sub-issues. This is a workforce remodelling tool.

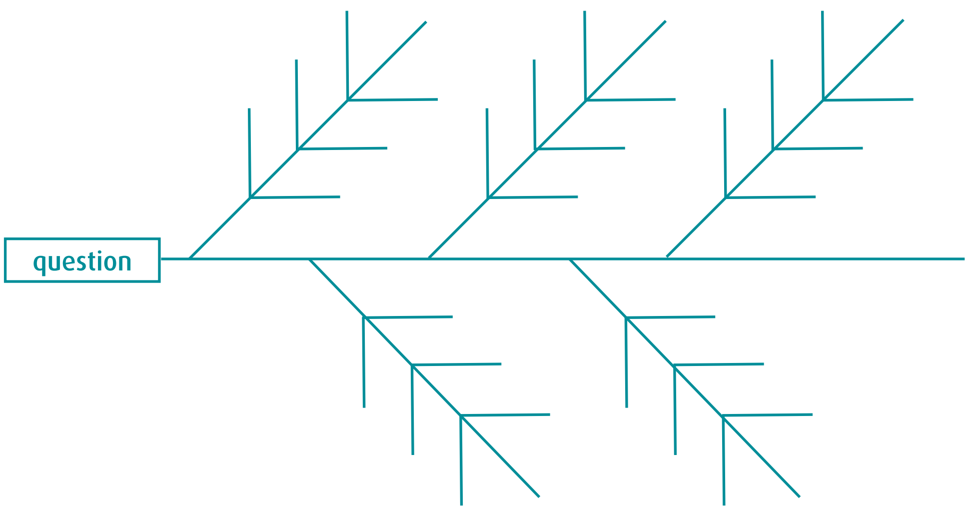
Use

Exploring complex problems; team-building

Fishbone analysis is a good tool to help teams explore the perceived difficulties of multi-agency working. Working in this way, teams begin to understand the elements contributing to a perceived problem.

How to run it

Write the problem statement on the right-hand side of a large sheet of paper. Draw a straight horizontal line to the left (like the backbone of a fish) and then draw stems at a 45-degree angle to the backbone line. At the end of each of these stems, brainstorm five or six key factors and then break each key factor into subsidiary factors that must be understood before moving on to solutions in the development phase.



Top tips

1. Encourage the team to brainstorm each main fishbone in turn.
2. Each member could take responsibility for facilitating the brainstorming of one main bone. This way it also becomes a team-building exercise.

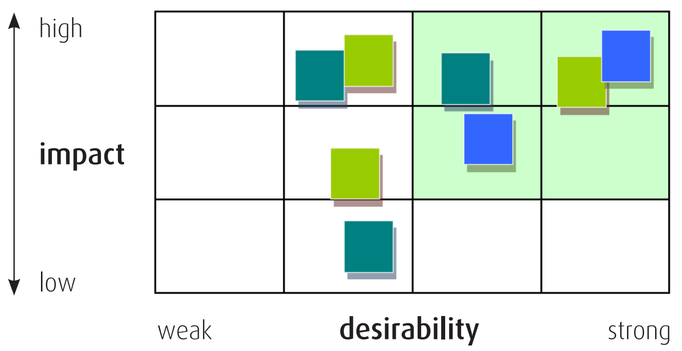
Tool	Force field analysis
In brief	**Invented by Kurt Lewin, force field analysis is way of analysing situations and assessing the different forces that may impact on it. It helps participants to explore the relative strengths of the impulses that might make them want to act (driving forces) and those that prevent or inhibit action (restraining forces).**
Use	**Analysis and reflection; decision-making** Force field analysis is used for analysis and reflection. In any situation you need to have more driving forces than restraining forces if you want to move forward. It is especially useful technique when you are trying to weigh up competing courses of action. It helps you to see the relative pros and cons in any complex situation and to plan to strengthen the forces supporting a decision, and reduce the impact of opposition to it. Force field analysis encourages agreement and reflection in a group through discussion of the underlying causes of a problem.
How to run it	**1.** Take a particular proposition or vision that you are considering, for example, the employment of a paid co-ordinator for a learning community or a plan to combine in-service training (Inset) budgets to fund network events in the coming year. **2.** Draw two columns on a page or flip chart, labelled Driving forces and Restraining forces respectively. **3.** List all driving forces for change in one column, and all forces against change in another column. **4.** Assign a score to each force from 1 (weak) to 5 (strong). **5.** Draw a diagram showing the forces for and against change. Show the size of each force as a number next to it. **6.** Use this as the focus of a discussion.
Top tips	**1.** Use numbers to help you to estimate the forces for change, but only as a guide. **2.** If all the restraining forces have high numbers and the driving forces score low, then you may want to think more creatively.

Tool	Futuring
In brief	**As well as reflecting on the present reality, being able to think creatively about future possibilities is an essential characteristic of any sustainable learning community.**
Use	**Blue-sky thinking; agreeing the vision and thinking about the future** Futuring ensures that groups have goals and consider possible options. Without this it is difficult to achieve focus and hard to move beyond what is currently seen as being possible.
How to run it	There are many ways of doing this. You might like to try one of these suggestions. 1. **What if?** Imagine a world in which there were no restraints. No history. No rules. No expense spared. Use this approach to generate ideal solutions to any issue being explored. 2. **Five years from now** As with the first idea, encourage participants to suspend some of the current constraints they may feel. But this time they have to be a little more realistic. 3. **Creative visualisation** Sometimes we forget to give ourselves time to dream our own private thoughts. Or perhaps we find it embarrassing. Whatever the reason, you may like to try taking participants on a guided visualisation. Get them to close their eyes. Allow silence to descend. Ask them to take five slow breaths in and out. Paint a picture of somewhere nice and invite them to create a special place of their own. Once you have calmed them down, start to inject some of the issues you have been discussing and invite them to visualise solutions.
Top tips	1. Insist that the group takes time on a regular basis to think about where it is going in the future. 2. Be aware that those of a more active or pragmatic nature may find these kinds of activity difficult at first.

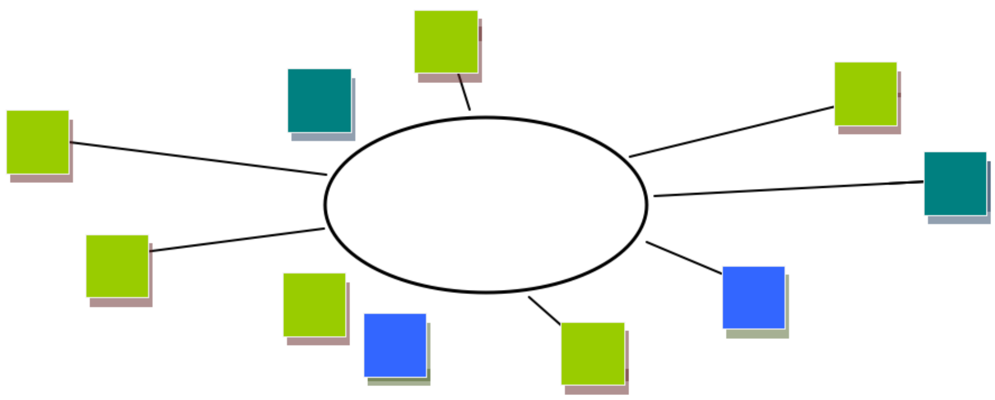
Tool	Ice breakers
In brief	**Ice breakers work best in small groups of five to eight people. The example given here, ‘Get to know you’ is an informal activity that gets a group working together very quickly.**
Use	**Forming new relationships quickly; opening discussion** This activity mobilises a change team and is particularly effective at the first meeting of a disparate group because it helps people overcome their inhibitions.
How to run it	Take three sticky notes and write on each one a statement about yourself (things no one in the group would know) of which only one is true. Example: – I’m a trained psychiatrist. – I always spend my holidays in Skegness. – I’m a pole vaulter in my spare time. Present your three statements to the others but do not reveal which are false. The other team members each have one vote to select one statement they consider to be true. If they get it right, they score a point. If not, you get a point. Keep a record of the scores. The highest score wins.
Top tips	**1.** A variation on the above is to ask everyone write one (true) thing about themselves that no one knows and puts the note in a hat. These are pulled out one at a time and the person shares a little more information about themselves. **2.** If writing could be a problem for example for people speaking English as an additional language or those with literacy challenges an alternative is to group 8-10 people in a circle with a small ball. Each person throws the ball to a different person each time and says their own name. A second and third ball can be introduced into the circle. This creates laughter and energy in a group.

Tool	Learning conversations
In brief	**Community marketplaces have always been the place where news and gossip are shared and where the seeds of discontent can be sown. Adapted for a facilitated session they are an excellent means of sharing information in a spirited and rapid way.**
Use	**Giving and receiving feedback; sharing ideas** This is a highly interactive means of giving and receiving feedback which allows lots of opportunities for challenge and dissent. It prevents facilitators from having to provide neat summaries of complex issues and can be used with large numbers of people. This is a method of sharing, challenging and refining their work.
How to run it	**1.** Each group makes a clear (possibly graphic) summary of their conclusions, issues or key points related to a theme or challenge on a single piece of flip chartpaper. Create a community marketplace with stalls where they as stall-holders can outline their findings . **2.** Each group has one or two parents stay with their stall and the rest go out as knowledge-gatherers to visit other stalls. The knowledge-gatherers are invited to talk, question or challenge the stall-holders they meet. **3.** Every 5 – 10 minutes, make a distinctive sound or use a microphone to signal to the groups that it is time to move to the next group. **4.** Once groups have visited the majority of stalls, ask them to return to their original group. Get them to share what they have learned and ask them to alter their flip chart in the light of insights they have gained from others. **5.** Invite everyone to go on a grand promenade to look at all of the stalls. **6.** Finally, get a flavour of people's impression by asking for one or two comments before formally closing the marketplace.
Top tips	**1.** Make sure that the room is set up in such a way that it is easy for people to stand around flip charts and listen to the stall-holders. **2.** Listen in and watch the interactions as they are happening so that, as facilitator, you can observe any helpful trends or common impressions. **3.** When you bring the session to a close, you may like to point out a few of the ideas or points which seem to have been interesting to participants.

Tool	Photo-language
In brief	**Photo-language is an increasingly widely used observation research method. It can complement other sources of data collection such as interviews and participant observation.**
Use	**Engagement; surfacing assumptions and values** Photo-language engages people in the use of photographs or visual material. The purposes of photo-language include: – understanding a context or situation – telling a story or developing narrative(s) – exploring values – surfacing assumptions There are many ways that photo-language can be used. For example, a single photograph can be covered up and revealed slowly to an individual or group. This approach has the potential to surface assumptions about a context or situation and to heighten awareness of enquiry by getting participants to raise issues and questions (eg, Where do I start? What else do you need to find out?).
How to run it	Display a range of photos around the room or arrange them on a table or the floor. Participants move around in silence looking at the photographs. Participants select one photo from the range available that represents for them a particular situation such as being a headteacher, a pupil, a learner, a co-leader etc. Participants describe why they selected a particular image and what it means. You might ask the participants to go through a group consensus process to narrow the number of photographs to be examined or you might focus on a group of photographs and ask more detailed questions.
Top tips	You may wish to ask participants to just note, in their mind, the photograph they have selected rather than picking it up. In this way more people can choose the same photograph and it gives participants a non-threatening way to change their minds.

Tool	Prioritisation matrix
In brief	**This visual tool is a quick, effective way to generate group consensus about what should be a priority.**
Use	**Gaining consensus; prioritisation** Use a prioritisation matrix whenever you need to short-list a large number of items, such as challenges or opportunities, into a more manageable number. This is a workforce remodelling tool.
How to run it	List all the possibilities for action and rate them according to: – **impact:** if we did this, what positive impact would it have on fulfilling our objective? (Low, Medium, High) – **desirability:** just how pressing is the desire to do this? (Low, Medium, High) Then plot each on the prioritisation matrix accordingly and moderate their relative positioning in the matrix to arrive at a sensible distribution. Write each item on a sticky note and, taking them in turn, ask the team to rate items on impact and desirability. The ideal outcome is to have items distributed across the matrix so only a few fall in the top right-hand box. 
Top tips	Limit debate if you need to attain a quick consensus.

Tool	Problem-solving and team-building (PSTB)
In brief	**This tool, developed by the Training and Development Agency for Schools (TDA), creates breakthrough progress on an intractable problem by harnessing the team's power. It generates solutions for objectives with complex underlying issues.**
Use	**Teambuilding; problem-solving** PSTB is a focused and objective process that brings together individuals with appropriate expertise to work through a number of stages within a set timeframe. This is a workforce remodelling/school improvement planning framework (SIPF) tool.
How to run it	Assign the following roles: **Problem owner:** This person will focus on the content of the session, make decisions and take responsibility for implementing the resulting action plan. **Facilitator:** This person focuses on the process of the session, keeping the meeting on track and encouraging creative thinking. **Resources:** These are the other participants who will contribute with their ideas and expertise. The team works through the following steps: **1.** The problem owner presents the problem statement in the form of question: 'How do I...?' **2.** Subsequent questions from the resources are for clarification only. The facilitator encourages brainstorming. **3.** The problem owner picks the two to three of the most promising ideas without explaining or justifying his or her choices. **4.** Benefits and concerns for each selected idea are brainstormed, and the problem owner circles any concern he or she believes to be critical. **5.** The participants explore the critical concerns and may eliminate an idea if the objection cannot be overcome. **6.** An action plan is agreed to provide a blueprint for addressing the problem.
Top tips	**1.** At the problem statement stage, the owner should be encouraged to give a brief (2 – 3 minute) oral overview of his or her problem. **2.** Encourage participants to offer any solutions (however diverse) or answers, allowing the person who presented the problem to draw his or her own conclusions later in the process.

Tool	Spidergram
In brief	**The spidergram is used as a TDA (now Teaching Agency) school improvement planning framework (SIPF) tool. This is a good starting point for generating solutions that meet your objectives.**
Use	**Problem-solving; gathering ideas** Use the spidergram to gather input from a range of different stakeholders and to help create a sense of ownership among those who will be ultimately involved in implementing the solutions.
How to run it	Write each objective in the centre of a large sheet of paper, drawing a line across the middle of the page. Ask participants to write down on individual stickies any existing solutions that support the objective. Place these on the paper above the line. Then ask participants to write down any new activities, eg providing funding, recruiting people or creating meeting space. 
Top tips	**1.** Engage as wide a group of people as possible to generate a large number of ideas. **2.** Look for duplication of ideas or activities and look at ways these can be rationalised. **3.** Leave the outputs on display in a common area for a few days and encourage people to add to them.

Tool

Strengths, weaknesses, opportunities, threats (SWOT) analysis

In brief

A SWOT analysis is a method of analysing data and situations. It takes its name from these four words: strengths, weaknesses, opportunities and threats. It is a very useful tool for analysing possible courses of action.

Use

Establishing a baseline; analysis of organisations and situations

SWOT analysis helps you to come up with a realistic overview and begin to think of possible courses of action and to develop a strategy. This is a school improvement planning framework (SIPF)/workforce remodelling tool.

How to run it

Decide on a situation or focus on a particular organisation. Participants can work as individuals or in groups. One approach is to create four groups, one to look at each of the four categories. Using the diagram below, starting in the top left-hand corner, make a list of as many ideas as possible under each of the headings.

strengths	weaknesses
opportunities	threats

Ask the group to consider the following questions:

- How can we best exploit our strengths?
- How can we address our weaknesses effectively?
- How can we ensure that we take advantage of our opportunities?
- How can we anticipate threats and develop strategies for turning them into opportunities?
- Are any of the responses surprising?

Top tips

1. You might like to give everyone a few moments of quiet to make their own lists before sharing them with the group.
2. Where possible participants should provide supporting evidence.
3. Feedback can be gathered anonymously by putting up a sheet of paper in a communal area.
4. Ask specific groups of participants to use different coloured stickies and then compare responses.
5. Set clear guidelines about the amount of time to be spent.
6. Make sure participants start with the positive or they can get very downhearted.

Tool	Talking walls
In brief	**Walls cannot really talk, but some can communicate more effectively than others. A talking wall is a portion of wall, large whiteboard, large vertical stand or series of flip charts used in such a way that participants can communicate with each other as a session progresses.**
Use	**Engaging large numbers of people in a discussion; capturing points of view; reviewing work** The main benefit of a talking wall is the degree of communication between participants that can be introduced without any facilitator activity. This enables participants to keep on returning to complex issues, iterating and reiterating their opinions and modifying them in response to other people's comments and questions
How to run it	There is really no limit other than your ingenuity as to how this concept can be developed. Examples of artwork could show a large panel with stickies, clouds for cartoon messages, hexagons to cluster points together, various shapes, lots of pens, coloured dots, pins, felt tips, stars etc. The role of the facilitator is to ensure that the talking wall is seen as an integral part of the session. This can be achieved by constantly creating opportunities to use it and also by referring to it on a regular basis. You might also like to devote parts of the session specifically for people to use it.
Top tips	Make sure you have lots of equipment, especially felt-tip pens. Having to wait for a pen takes away the creative edge. Decide which elements of the session the talking wall will contribute to most and focus your efforts on this.

Tool	Think pieces
In brief	**Think pieces are short pieces of texts that are intended to inform and encourage reflection on a range of themes and issues. The author reflects on his or her own opinions of an issue and includes links that he or she has drawn upon.** **Each think piece will include a short introduction and a series of key questions that you should consider in relation to the topic area. They may suggest activities or a reading list and appropriate web links for the reader to follow up.**
Use	**Reflection, sharing opinions and developing knowledge and understanding** Participants will be encouraged, through personal critical reflection, to look at ideas afresh. This activity also encourages group sharing of ideas and discussion.
How to run it	**1.** One think piece can be read by all participants. **2.** A set time is agreed for this task eg 2 – 10 minutes. **3.** A facilitator is the timekeeper. **4.** Either the author has included questions for further debate or via the facilitator the group can establish its own key questions as a result of reading the think piece. **5.** The group then engages in summarising the key points and debating key questions or issues for an agreed period of time.
Top tips	If a range of think pieces on a focus area is used, a small group or an individual can summarise what they have read about to the others in the wider group to share learning.

Tool: Think, feel, say, do

In brief

This TDA (now Teaching Agency) tool is part of the school improvement planning framework (SIPF). The aim is to establish and agree a vision that will drive future planning.

Use

Gather input from a variety of stakeholders; develop a better understanding of priorities

This is a quick and easy way to identify a strategic vision at the start of a planning process.

How to run it

Invite a variety of different stakeholders to participate. Ask members to think about how they would like the organisation to look in three years' time.

Using stickies, ask stakeholders to write down the answers to the question 'In three years' time, what do we want to think/feel/say/do?' Use one sticky per idea.

Stickies should be labelled T/F/S/D and stuck onto a large sheet of paper or flip chart:

think	feel
say/see	do

The group can explore the commonalities and discrepancies of responses from different stakeholder groups. The feedback should be shared with the planning team to inform the planning process.

Top tips

If the group finds it difficult to distinguish between think and feel (for example when using this with pupils), the two categories can be combined.

Some groups use 'see' instead of 'say'.

Tool	Vernissage
In brief	**Vernissage is a French word used to describe the day before an art exhibition opens when the artists come and varnish (ie put the finishing touches to) their paintings. It is also the time when critics come and get a preview of the works on display. In facilitation it has come to describe the process where groups can comment on and react to the work of their colleagues**
Use	**Obtaining a collective opinion** From time to time, either because the subject matter is complex or because it is important to take a decision which involves prioritising a number of different elements, it is helpful for a group to be able to give its collective opinion on something. Vernissage is a technique which many facilitators find helpful for managing this process.
How to run it	This technique is, in a sense, a variation of the community marketplace. The difference is that it allows a more quantitative approach to conversations and allows individuals to express clear personal preferences. Ensure that each group (or individual) has expressed their opinions on a flip chart. Then equip each individual with a number of coloured dots, stickies, hearts, jagged lightning strikes and cartoon balloons for writing comments. For those issues where you want to vote, use the coloured dots. Ask individuals to choose the ideas that they wish to support by sticking a dot on them. (Give each person the same number of dots.) For those issues where you want to encourage dialogue, invite people to use their stickies, cartoon balloons, hearts (to describe support) and lightning strikes (to show disapproval). Once the voting has taken place, see if you can draw together the strands of opinion.
Top tips	**1.** Start by drawing attention to areas of common ground. **2.** When there are strongly different viewpoints, avoid trying to massage the facts. See it as your role to point out the areas of disagreement and engage groups in working through them. **3.** Encourage people’s creativity by getting them to come up with novel ways of expressing their opinions as part of this process.

Tool: What's working

In brief

This school improvement planning framework (SIPF) tool helps to evaluate current activities. It is an effective way of gathering feedback from a range of stakeholders, stimulating discussion and building consensus.

Use

Stimulating discussion; decision-making

Participants take one aspect of, for example, teaching and learning, and write responses to this on stickies and provide supporting evidence where possible. Quick wins and challenges can form discussion points.

How to run it

A chart is drawn out as shown:

In our team...

In our team	
Celebrate... Whats working well?	
Quick wins... Whats working so-so?	
Challenges... Whats not working so well?	

Participants look at the header statement and write their responses on stickies for each of the three categories. Where possible a facilitator for each group enables discussion to take place around the responses with participants orally expanding their responses.

Top tips

Facilitation enables group discussion to be more structured.

Tool	World café
In brief	**World café is a phrase that has been adopted to describe an approach to knowledge-sharing which assumes that it is more akin to conversations in a friendly café than to formal meetings in airless rooms. There is no set methodology, although a typical assumption would be that conversations would be held between people sitting at small round tables according to a number of simple principles.**
Use	**Ideas generation; developing relationships; engaging large groups in dialogue** The world café approach is especially effective when large numbers of people are seeking to deal with lots of complex data.
How to run it	The room is set up to resemble a café, with good-quality paper tablecloths on each table for members to write or draw on. A facilitator poses the same question to each table; this may follow a presentation of information and be linked to this or may be a general question, eg 'How can we work better together?' Table members then record their comments and ideas on the tablecloth in words, or pictures and discuss with each other their thinking. The facilitator sets the time span for this. When the time is called, one member of the table group remains while all other members go to a different table. As the new group assembles, the person who has remained at the table shares the essence of the previous group's discussion and then the table group moves on to a second question. Further comments are added to the tablecloth and when time is called one person remains on the table. This process is repeated a third time. All members then return to their original tables and have time to read what others have contributed to the session.
Top tips	**1.** Make sure the tablecloths are good quality and felt pens will not mark tables. **2.** Encourage individuals to record their thoughts in pictures or symbols or by linking similar ideas with arrows or lines. **3.** Encourage participants to move to different groups.

Section 4: Resources

Structuring your session

Preparing a talk always takes far longer than you anticipate, so start early.

- Write a clear statement of the subject and its importance.
- Research and collect material that relates to the topic.
- Tell a story in a logical sequence.
- Stick to the key concepts and avoid description of specifics and unnecessary detail.
- If you are making a series of points, organise them from the most to the least important. The less important points can be skipped if you run short of time.
- Keep your sentences short (about 10-20 words each is ideal). This is the way people usually talk.
- Strive for clarity. Are these the best words for making your point? Are they unambiguous? Are you using unfamiliar jargon or acronyms?

Preparing your slides

Presentation design

- Don't overload your slides with too much text or data.
- Focus. In general, using a few powerful slides is the aim.
- Let the picture or graphic tell the story and avoid text.
- Type key words in the PowerPoint notes area listing what to say when displaying the slide. You can print these notes off separately.
- Number your slides and give each one a title.
- Use the summary slide feature in slide sorter view to prepare an agenda or table of contents slide.
- Prepare your logo slide for your presentation
- You can add a logo and other graphics to each slide using the slide master feature.
- Proofread everything, including visuals and numbers.
- Keep similar topics together.
- Strive for similar line lengths for text.

Text

- Font size must be large enough to be easily read. Size 18 – 24 with a bold font is recommended. The title default size is 26 – 28. Use Arial font for titles.
- It is distracting if you use too wide a variety of fonts.
- Overuse of text is a common mistake.
- Too much text makes the slide unreadable, so stick to a few key words.
- If your audience is reading the slides they are not paying attention to you. If possible, make your point with graphics instead of text.
- You can use WordArt or Clip Art to convey text in a more interesting way.

Numbers

- Numbers are usually confusing to the audience. Use as few as possible and allow extra time for the audience to understand and interpret any figures.
- If you have more than 15 numbers on a slide, that's probably too many.
- Using only one number per sentence helps the audience absorb the data.

Charts

- Charts need to be clearly labelled. You can make charts interesting by adding elements from the drawing toolbar.
- Numbers in tables are both hard to see and to understand. There is usually a better way to present your numerical data than with columns and rows of numbers, so be creative.
- PowerPoint deletes portions of charts and worksheets that are imported from Excel, keeping only the leftmost 5.5 inches. Plan ahead so that you can avoid this happening.

Backgrounds

- Backgrounds should never distract from the presentation.
- Using the default white background is hard on the viewer's eyes. You can easily add a design style or a colour to the background.
- Backgrounds that are light-coloured with dark text, or vice versa, look good. A dark background with white font reduces glare.
- Colours appear lighter when projected. Pale colours often appear as white.
- Consistent backgrounds add to a professional appearance.
- For a long presentation, you may want to change background designs when shifting to a new topic.

Excitement

- Slides for presentations should kept simple. You don't want to distract the audience.
- Sounds and transition effects can be annoying. Use sparingly.
- Animation effects can be interesting when used in moderation, although too much animation is distracting.
- Consider using animated Clip Art or custom animation.
- You can insert video and audio clips into PowerPoint.
- You can also insert hyperlinks.

Hints for efficient practice

Timing: practising your presentation

- Talk through your presentation to see how much time you use for each slide.
- Set the automatic slide transition to the amount of time you want to spend discussing each slide.
- Are you using the right amount of time per slide? Decide which slides or comments need alteration to make your presentation smoother.
- Change the automatic slide transition settings for individual slides to fit the amount of time needed for that slide and practise again. Are you still within the time limit?
- Decide if you want to remove the automatic slide transition feature before giving the presentation.

Content

- Make a list of key words and concepts for each slide.
- Read through the list before you begin.
- Don't attempt to memorise your text.
- Your words will probably be slightly different each time you practise.
- Think about the ideas, and your words will follow naturally.

Giving your talk

Pre-talk preparation

- Plan to get there early to set up and test the equipment.
- Check to make sure that your slideshow runs on the computer that will be used on the presentation day.
- Make sure you understand how to control the lights and the slide projector (or computer remote controls).
- Dress appropriately for your audience.
- Turn off your mobile.

Handouts

- Edward Tufte, the leading expert on visual presentation techniques, advises speakers to always prepare a handout when giving a PowerPoint presentation.
- Prepare about 10 per cent more handouts than you expect to use.
- Distribute handouts at the beginning of your talk.

Opening

- Jump right in and get to the point.
- Give your rehearsed opening statement; don't improvise at the last moment.
- Use the opening to catch the interest and attention of the audience.
- Briefly state the problem or topic you will be discussing.
- Briefly summarise your main theme for an idea or solution.

Speaking

- Stand at the front of the room, not at the back near the projector.
- Talk at a natural, moderate rate of speech.
- Project your voice.
- Speak clearly and distinctly.
- Repeat critical information.
- Pause briefly to give your audience time to digest the information on each new slide.
- Try to look at your audience, not at your slides, as you speak.
- Don't read the slides aloud. Your audience can read them far faster than you can talk.

Body language

- Keep your eyes on the audience.
- Use natural gestures.
- Don’t turn your back to the audience.
- Don’t hide behind the lectern.
- Avoid looking at your notes. Only use them as reference points to keep you on track. Talk, don’t read.

Questions

- Always leave time for a few questions at the end of the talk.
- If you allow questions during the talk, the presentation time will be about 25 per cent more than the practice time.
- You can jump directly to a slide by typing its number or by right-clicking during the presentation and choosing from the slide titles.
- Relax. If you’ve done the research you can easily answer most questions.
- If some questions are too specific or personal, politely decline to answer.
- If you can’t answer a question, say so. Don’t apologise. Say ‘I haven’t got that information. I’ll try and find out for you.’

Length

- To end on time, you must practise.
- When practising, try to end early. You need to allow time for audience interruptions and questions.

Demeanour

- Show some enthusiasm. Nobody wants to listen to a dull presentation. On the other hand, don’t overdo it. Nobody talks and gestures like a maniac in real life. How would you explain your ideas to a friend?
- Involve your audience. Ask questions, make eye contact, use humour.
- Don’t get distracted by audience noises or movements.
- You’ll forget a minor point or two. Everybody does.
- If you temporarily lose your train of thought you can gain time to recover by asking if the audience has any questions.

Conclusion

- Concisely summarise your key concepts and the main ideas of your presentation.
- Resist the temptation to add a few last impromptu words.
- End your talk with the summary statement or question you have prepared. What do you want them to do? What do you want them to remember?
- Consider alternatives to 'Questions?' for your closing slide. You could use a summary of your key points, or your logo.

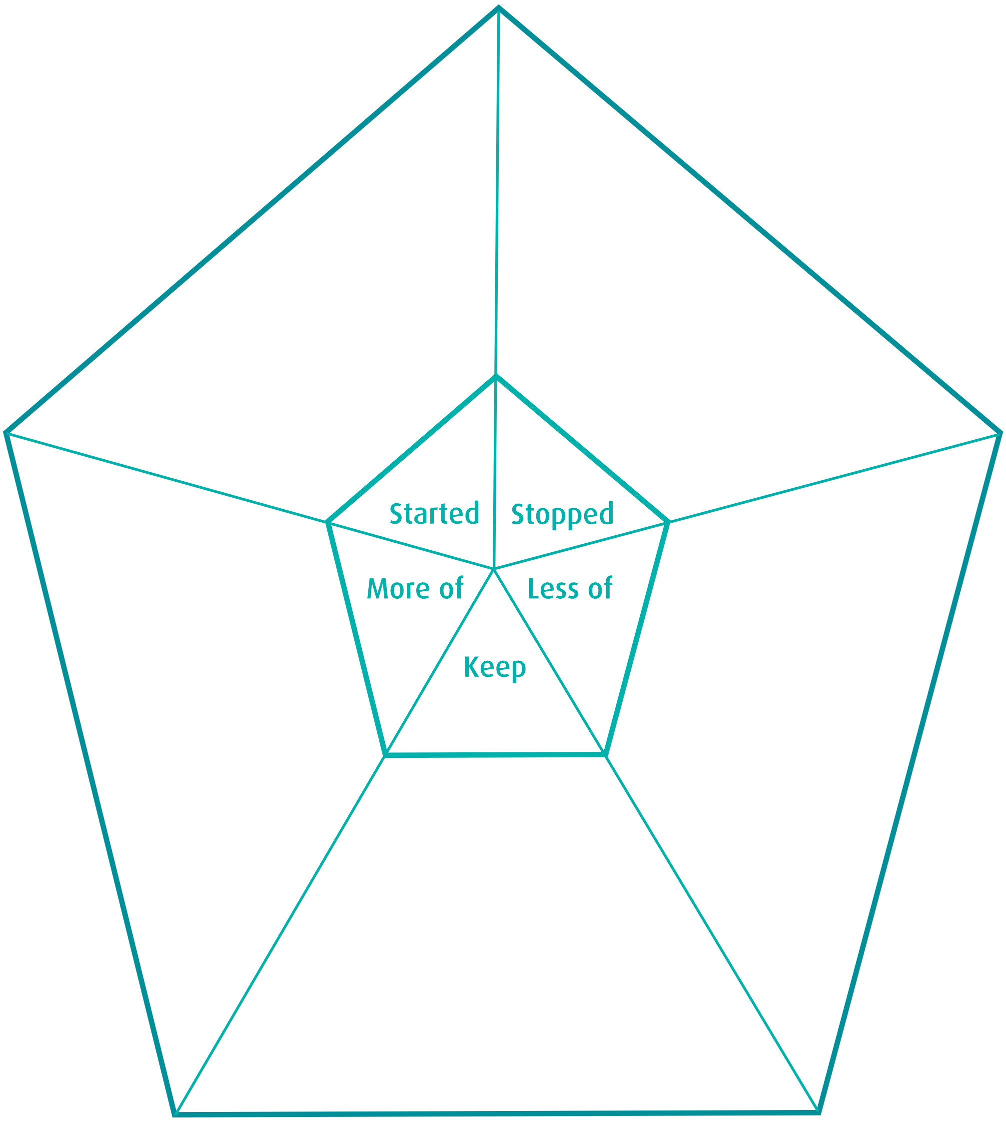
Presentation content

The following recommendations are for a 20-minute research presentation.

- Title slide: Title, your name, institution and email address if you think people would be interested in contacting you. This slide will be displayed as you are being introduced. Don't read the text to your audience, unless you know that it contains people who cannot read.
- Introduction: [2 min, 4 slides]
- Materials and methods: [Approximately 2 minutes, 4 slides]
- Results: [7 min, 4 slides]
- Conclusions: If you have more than one slide that says 'Conclusions', rename the earlier ones so that the audience doesn't actually think you are concluding your presentation. [4 min, 3 slides]
- Questions: Leave your conclusion slide up, so that your audience can refer to it.

Figure 7: The pentagon review

The tool below can help participants capture the key learning points for them and consider their next steps. It may also contribute to the evaluation of the event or activity.



Pentagon reflection sheet

Developing case studies

Case studies are part of an approach to innovative and disciplined collaborative enquiry. Best practice is when participants combine a number of approaches, from writing frames that guide content, to multi-media records of activity within the overall work. Case studies (also known as accounts of practice) make learning more widely available for different audiences. Additionally, readers will often add to their own learning in terms of:

- enquiry planning
- disciplined shared enquiry
- joint writing of accounts
- use of written accounts to transfer learning between and beyond participant schools

There are some key assumptions around how clusters might work on the case study. Participants will:

- want to work together to provide an authentic account that not only helps the host environment in that it reflects, interprets and inspires further discussion and learning, but also is sufficiently explicit about the experiences so that other audiences can quickly access learning and understanding of the context, activity and outcomes
- feel valued, motivated, accountable and have an equal opportunity to contribute to the collective outcomes
- observe the work of others in a reflective but analytical and non-judgemental manner
- learn from the critical perspectives, insights, description and evaluation of others, and be prepared to act on this new understanding
- accept that the account is designed solely for learning and not for accountability, and that it will be shared with the hosts and validated prior to publication
- be totally committed to contributing to the account as the recordable and usable outcome of the shared enquiry

There is no one way to write accounts or case studies and this variation is part of the attraction and interest generated by publication. However, it should reflect you, your ideas, interpretations and suggestions, and this is more difficult when a group is involved. Whilst it might therefore seem simpler if one person writes, this is a process that should create dialogue around the story, the ideas it has generated, and the interpretations and suggestions you make. Therefore working out the protocols of writing and talking together before the event is of paramount importance and will aid the process of writing and collective group thinking.

The important thing is the interpretative story the account tells. If the receiving audience can understand the story and abstract the key points easily, then the job is done.

The cluster can check the drafting by reference to the following questions:

- What do we want the reader to take from this account? (Keep the writing crisp and the evidence clear as there is no need to include everything.)
- Does each part of the account lead easily from one to the next? (It is possible to write individual parts and then share them for further amendment or editing. One person should be the final editor and have the role of chasing and confirming viewpoints agreed by all.)
- Are we bogged down in the detail? Is the story we want to tell clear? (Keep the focus of the account to the forefront of your thinking at all times maybe even write this at the top of each page of drafting. Detail about the context is valuable only if it explains the focus area. Other things might be interesting, but are they to do with the focus?)
- Does this sound authentic, or are we trying to sound like someone else? (Write instinctively about how things seem and feel. Use 'I' or 'we' in the account. Avoid passive forms such as, 'it was decided...' as this tends to deaden the reading experience. Use direct quotations from people wherever you can.)
- Does the point of the study come through easily? (Share the draft with people who were not involved and get their feedback. Listen to their comments and be prepared to act on them. Sharing work during the process is also likely to be more helpful to develop amendments than having to rewrite an almost final piece from comments received at the end of drafting.)

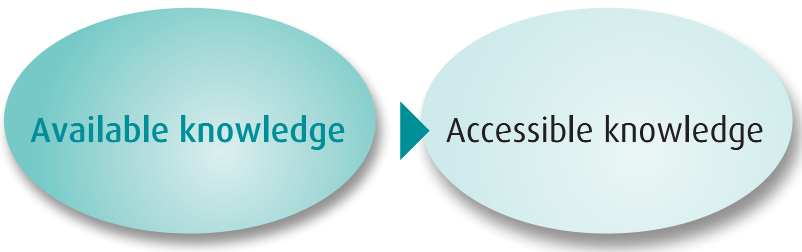
Figure 8: Some possible structures

Background	Before the visit	During the visit	After the visit	Our thinking
Context and enquiry question	First impressions	Learning from practice in classrooms/ with leaders	Learning around the school	Learning for the future
Our enquiry purpose/the school	What we saw happening	What the impact was	What we think	What now?

Appendix 1: Three fields of knowledge

What is known: making public knowledge accessible

Within the leadership network, facilitators can use a number of protocols to enable network participants to engage with the available information in a way that encourages accessibility and usability.



Examples

Using think pieces for personal study

A series of think pieces can be given to network participants to engage them with the public knowledge -base regarding specific aspects of research. A protocol can be adopted (see A-Z with protocols table for examples) to enable reflective questions which can be used by participants to deepen their understanding of the text. Participants can then be offered time to reflect on their interpretations of key points raised. This can be followed up through group discussion.

Developing collaborative study groups

A collaborative study group is formed by peers who meet to reflect on practice and to consider contributions from theory and research. The study group process is underpinned by protocols to ensure that all group members participate equally in discussion. The power of the process lies in the critical engagement with the literature and the new knowledge generated by the interaction of group members.

See Mohr, N, 1998, *Creating effective study groups for principals,* Education Leadership ASCD, April, 55(7), 41 4

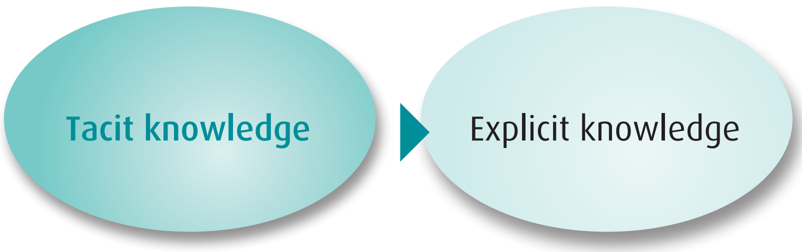
Applying conceptual frameworks

As pre-reading for a seminar involving school leaders, participants could be asked to consider the theoretical perspectives outlined in a series of think pieces or case studies. A protocol can be applied to direct participants in examining these perspectives with a particular conceptual framework in mind. This could involve exploring concepts such as distributed leadership, learning-centred leadership, enquiry-based leadership and leadership for moral purpose.

Once these ideas have been explored, participants can go on to apply this conceptual framework to an analysis of their own practice.

See National College, 2006, *Network leadership in action: Sharing leadership,* Nottingham, National College for School Leadership

What we know: making practice visible



The following approaches and their associated protocols have proved to be effective in facilitating the process of enabling practitioners to discuss their professional experiences. They have been used successfully to support participants in capturing the detail of their practices and identifying the skills, attitudes and knowledge drawn upon in undertaking network activity and the leadership of learning within their schools.

Exploring practice through narrative as text

Practice narratives

The initial stage of appreciative inquiry (see appreciative inquiry protocol) of 'discovering the best of what is' can be used effectively to engage participants in the creation of practice narratives. This protocol involves the production of written accounts which capture stories of practice experienced at its best. It helps if there is guidance to structure stories in ways which capture the knowledge, skills, attitudes, values and feelings involved.

See National College, 2006, *School leaders leading the system: Perspectives from practice,* Nottingham, National College for School Leadership

Capturing practice through personal reflection

Learning journals

Turning experience into learning can be helped by the use of a learning journal. As a protocol, learning journals provide a framework for reflection, enabling practitioners to trace their emerging learning and understanding of their practice. When used in a collaborative context, learning journals can also enable individuals to share their development with others.

See PP Grimmett & MEJ Dockendorf, 1999. In *Researching Teaching: Methodologies and practices for understanding pedagogy,* Edited by J Loughran, 92-94

Examining practice through collaborative reflection

World café

This approach is rooted in a belief that creating a positive future begins with human conversation   talking with other people as though the answers mattered. The protocols for this approach involve round-table discussions or café conversations where the outcomes are often captured by recording key questions or ideas on the tablecloth. As conversation groups rotate, a store of ideas and perspectives is generated, each building on the previous conversation.

See **www.theworldcafe.com.**

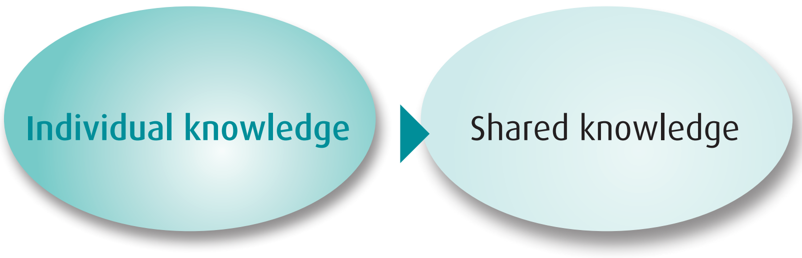
Creating new knowledge through collaborative work

Gathering teachers, learners or leaders together in one place doesn't guarantee that it will be a learning occasion. That often depends upon the:

- extent to which individual knowledge is made explicit
- use that can be made of the learning out there in the public domain
- level of engagement within the group

This needs to move beyond a basic level of sharing by exchanging information towards the co-creation of new knowledge and innovation, to a widening of perspectives – changing the way we see things and bringing new ideas into play.

Protocols offer a way of deliberately integrating these elements into all professional development and leadership learning opportunities.



Exchanging knowledge for shared learning

Learning conversations

Learning conversations require facilitator skill in both deep listening and deep questioning. Protocols can be effective in structuring the exchange of learning through interactive and collaborative dialogue using one of a number of different conversation frames for example, workshop, forum, consultation or hot seat.

See National College, 2005, *Learning conversations in learning networks*, Nottingham, National College for School Leadership

Sharing knowledge for joint problem-solving

Open learning sets

Open learning sets involve the facilitator in engaging participants in reflection for action which results in a collaborative approach to problem-solving. This involves the protocol of identifying real issues and problems for collaborative analysis and action. The facilitator encourages participants to share their successes and failures to promote smarter knowledge exchange through shared analysis and building future scenarios.

See National College, 2003, *Open learning sets,* Nottingham, National College for School Leadership

Generating shared knowledge for future action

Appreciative inquiry

Appreciative inquiry (AI) is a futures-oriented approach to transformational change and organisational development. It begins by recognising the best in people and their current practice. It offers people the opportunity to define their future in relation to their values, goals and focus collaboratively, through an enquiry process.

AI involves the facilitation of the protocols associated with four distinct phases of enquiry: discover, dream, design, deliver.

See the appreciative inquiry tool at **www.taosinstitute.net.**

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