FORMATIVE ASSESSMENT PEER LEARNING COMMUNITY

Why Are We Supporting a Formative Assessment Peer Learning Community?

- State education agencies, early childhood administrators and training and technical assistance staff are seeking best practices in supporting appropriate policies and practices regarding formative assessment for very young children (infants through third-graders).
- Peer learning communities (PLCs) provide a model for connecting people in the spirit of learning, knowledge sharing, and collaboration, which can be useful for those seeking information about formative assessment.
- PLCs connect people within and across state agencies as well as across states who might not otherwise have the opportunity to interact, either frequently or at all.
- The formative assessment PLC can provide a shared context for people to communicate and share information and experiences, that builds understanding and insight about barriers to, and promising practices, regarding formative assessment.
- The formative assessment PLC will enable dialogue between people who come together to explore new possibilities, solve challenging problems, and create new opportunities.
- The PLC will serve as a vehicle for ongoing communication and self-reflection.
- Given the range of experiences among participants, the PLC will provide a platform for those with more experience to share with those beginning to support formative assessment. Moreover, more experienced members of the PLC will learn from those with less experience about the challenges, issues and questions that could inform their policies and practices.
- The PLC is designed to capture and diffuse existing knowledge to help improve practice by providing a forum to identify solutions to common problems and a process to collect and evaluate best practices.

What Is Our Vision for the Formative Assessment PLC?

Participants

- We are encouraging (but not requiring) participation by state teams including state early childhood administrators (e.g. early childhood specialists, Pre-K administrators, RTI coordinators) and their Part B (619) and Part C colleagues. Training and technical assistance providers and other interested parties are encouraged to attend as well.
- We are encouraging teams to regularly participate in the PLC as schedules permit.
- Participants are at varying stages in knowledge of and support for formative assessment. Analysis of survey results reveals that 15% have not yet started, 22% are planning, 61% are beginning implementation of formative assessment policies and practices. Members in the PLC have opportunities to learn from and with one another.

Principles

- Members will engage in collaborative processes, and the free flow of ideas and exchange of information is encouraged.
- Participants will be encouraged to actively participate in conversation
- Consistent with what the research shows about the best way to structure PLCs, our vision of the Formative Assessment PLC is that it will begin with a start-up phase, will move into full implementation, and will ultimately be sustained by participants.
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Overall Structure – The peer learning community is intended to be an ongoing technical assistance activity, launched in November 2013 and continuing as long as participants are interested and find the PLC useful. We will host monthly video conferences and keep notes that will be posted on a secure group website. Agendas will be co-developed by participants and the PLC facilitators. Participants may meet in smaller groups to discuss specific topics or issues. The structure and flow of the PLC will change based on the phase of implementation.

Start Up Phase

- The start-up phase, facilitated by CEELO and ECTA, will engage members through monthly video conferences, during which members share questions and experiences with formative assessment policies and practices. Each month one or two members will share questions and issues and members will present policies and practices on specific topics.
- We recommend that groups of individuals from each state will convene together (ideally co-located) to enable follow up conversation and debriefing after the call.

- Each call will begin with introductions and clarification of group learning objectives derived from the baseline survey and the previous month's conversation.
- The focus will be to identify opportunities and problems as well as resources that will be beneficial to participants.
- The facilitators and members will be encouraged to challenge one another on how the learning is being applied.
- Members will be asked to develop action plans for applying the learning and commit to the group to move forward.
- Participants will commit to ongoing participation in the PLC by sharing experiences, questions, lessons learned, or issues they are grappling with. Membership in the PLC will be in flux based on needs of members.
- The topics of focus for the first six months reflect priorities from survey respondents who plan to participate in the PLC. During the first six months the PLC will address the following issues:
  - How are states supporting appropriate policies and practices regarding formative assessment for very young children (infants through third-graders)?
  - What kinds of formative assessment instruments and processes are states and programs using?
  - How are states supporting the formative assessment process in classrooms?
  - What professional development models are states supporting to ensure teacher leaders and teachers engage in developmentally appropriate formative assessment practices?
  - How are states building and sustaining professional development and support for formative assessment within a state system?
  - How are states supporting the use of data from formative assessments to enhance child outcomes and improve program practice?

Full Implementation Phase

- After the first six months, the PLC will be co-facilitated by CEELO/ECTA and volunteer members of the PLC. Members will continue to engage through monthly video conferences.
- Members will meet in person at conferences or meetings that members regularly attend such as the CEELO Roundtable, NAEYC PDI
- The calls/meetings will begin with a short review of key objectives met to date, questions that the PLC is addressing, and objectives that were developed based on the last time the PLC convened.
- The secure webpage that includes resources and links will include a blog and Web 2.0 technology that will enable the regular easy sharing of documents, questions and materials among members.
- Members will be asked to share action plans that have been developed and to reflect on progress and lessons learned to date.
- The topics of focus during the implementation phase will derive from members of the PLC. If members feel it is important to survey members to determine focus or

priorities, CEELO and ECTA will conduct the survey and share results with members.

Sustainability Phase

- CEELO/ECTA will continue to serve as resources but members of the PLC will take leadership and facilitate the PLC. CEELO and ECTA will continue to provide logistical support, sponsoring the monthly video conferences and the secure webpage.
- Members will meet in person at conferences or meetings that members regularly attend such as the CEELO Roundtable, NAEYC PDI
- As new members join the PLC, members will openly welcome their participation and will ask new members to share issues. Depending upon the desire of members of the community, members might be matched to serve as mentors to new members.
- New technologies will be explored to continue to support the virtual sharing of information, reflections and promising practices.
- Members will be asked to share action plans that have been developed and to reflect on progress and lessons learned to date.
- The topics of focus will continue to derive from members of the PLC and regular reflection of progress and lessons learned will occur.

Details about Format and Structure

- Monthly videoconferences will be conducted using GoToMeeting. Members will receive a GoToMeeting link to see the video online. In addition, the following conference line will be used: 1-888-394-8197, participant passcode: 725 932 5044
- Powerpoints will be posted to the CEELO and ECTA websites.
- CEELO is hosting a secure, members only page for the Formative Assessment PLC. A summary of the monthly calls will be posted to the members only page. Members will have the ability to post resources and links. An interactive page will be available for members to post questions and address one another's questions.
- CEELO and ECTA will facilitate the Formative Assessment PLC. Kirsty Brown and Kathi Gillaspy are facilitating the PLC.
- CEELO and ECTA are identifying key resources including research, state examples, and technical assistance documents that will be available on the members only page.
- Member contact information will be available on the members only page.

A comprehensive guide to the steps involved in developing the PLC begins on the next page.

Peer Learning Community Guide

Objectives: This document is designed to present CEELO staff with the steps taken to establish and sustain a Peer Learning Community (PLC). We begin with a definition of a PLC and then present the steps to take to establish a PLC, resources CEELO has developed, and tools.

What is a PLC?

- Peer learning communities (PLCs) provide a model for connecting people in the spirit of learning, knowledge sharing, and collaboration.
- PLCs connect people within and across state agencies, as well as across states, who might not otherwise have the opportunity to interact, frequently or at all.
- A PLC can provide a context for people to communicate and share information and experiences that build understanding and insight about barriers to success and promising practices.
- A PLC can support dialogue between people who come together to explore new possibilities, solve challenging problems, and create new opportunities.
- The PLC can serve as a vehicle for ongoing communication and self-reflection.
- Given the range of experiences among participants, the PLC can provide a platform for those with more experience to share with those beginning to support formative assessment. Moreover, more experienced members of the PLC will learn from those with less experience about the challenges, issues, and questions that could inform their policies and practices.
- The PLC can capture and diffuse existing knowledge to help improve practice, by providing a forum to identify solutions to common problems and a process to collect and evaluate best practices.

Developing PLCs

Developing and sustaining a PLC occurs in three phases. During the development phase, the CEELO lead will gather information about interests and needs of members of the community and will provide direction. During the full implementation phase the members will engage as co-facilitators in the PLC. During the sustainability phase, members take on a leadership role and engage in activities both virtually and outside of the formal PLC meetings. These phases overlap somewhat. The steps taken to establish and sustain a PLC are listed below but the order might vary depending upon the nature of the community.

Designing and developing.

1. Design for evolution.
2. Open a dialogue between inside and outside perspectives.
3. Invite different levels of participation.
4. Develop both public and private community spaces.
5. Focus on value.
6. Combine familiarity and excitement.
7. Create a rhythm for the community.

Source: http://hbswk.hbs.edu/archive/2855.htm

Steps to Establish the Peer Learning Community

1. **Convene group of CEELO staff and consultants to conceptualize the content of the PLC, resources needed, scope, and possible sequence**. One CEELO staff member will take the lead but should identify other experts to serve as thought-partners. This group can help to identify key stakeholders (number 2 below), review responses to surveys, and help to shape the kick-off and subsequent PLC meetings. (Details follow.)

2. **Determine which research assistant/associate will be providing logistical support**. Melissa, Ashley and Michelle have been trained on Mailchimp, GotoMeeting/GotoWebinar, and some aspects of Surveymonkey. The logistical support person will use these tools to send out emails with surveys, details about the PLC, and registration information. Set up a time to coordinate with the logistical support person on a regular basis until the PLC is successfully launched, then coordination calls can be less frequent.

3. **Determine whether CEELO is co-sponsoring the PLC**. Reach out to content centers or other national organizations working on similar topics to maximize outreach and reduce possible duplication of efforts. The Formative Assessment PLC reached out to the Early Childhood TA center, sponsored by the Office of Special Education because they are working to support formative assessment.

4. **Develop template for emails, Powerpoints, and other communication**. Use the CEELO logo and the name of the PLC to develop a template for all emails, Powerpoints and materials to be developed. If the PLC is partnering with another organization to sponsor the PLC, develop a joint logo.

5. **Determine the target stakeholders for the PLC**.
   The target stakeholders could be early childhood specialists in state departments of education, a subset of these specialists, and could include other technical assistance (TA) providers, other personnel within the state education agency (SEA), or other personnel across state agencies. The target audience should reflect those who are responsible for administering and managing the issues that the PLC will address.

   The Formative Assessment PLC encourages (but does not require) participation by state teams including state early childhood administrators (e.g. early childhood specialists, Pre-K administrators, RTI coordinators) and their Part B (619) and Part C colleagues. Training and technical assistance providers and other interested parties are encouraged to attend as well. The Formative Assessment PLC also encourages experts from the CEELO partner organizations and CEELO consultants to participate if they are interested in and have expertise or questions about the key topic of interest. The Formative Assessment PLC encourages, but does not require, teams to regularly participate in the PLC as schedules permit.

6. **Obtain email lists of all target stakeholders and compile into an Excel file that is posted to Wiggio** and is clearly labeled with the date. Make sure the database includes all CEELO staff and consultants. This list might be updated and a subset of individuals might elect to participate. The logistical support person should clearly label each spreadsheet and post to the PLC folder on Wiggio.

7. **Develop a Surveymonkey survey** to individuals on target stakeholders list obtain information about the characteristics of the participants and interest in key topics. The logistical lead can help put questions into surveymonkey but the PLC lead should develop the questions. Diane is available to help with questions if you would like assistance.
   Surveymonkey login info is as follows:
   www.surveymonkey.com
   Username = CEELOsupport
   Password = NAECS-SDE

   A sample Surveymonkey is available at:

   https://www.surveymonkey.com/MySurvey_EditorFull.aspx?sm=v7TNaxYxMV81YdGeWNAj4oTmpEIayDhDdccYOO8m2p0%3d

8. **Use the address book feature of Surveymonkey to send the survey so that you can send targeted follow up emails to non-respondents**. Use the template for the PLC. The logistical support person should send out the Surveymonkey. It is possible for the

Surveymonkey to come from someone other than the person sending it, so determine whether you want the logistical support person to be the contact or you would prefer to have the PLC lead or another coordinator listed in the 'sent' line.

9. **Download Surveymonkey results**. To analyze the results, log into Surveymonkey and click on the analyze button. A summary of results with pretty graphics shows up and you can see the responses to open-ended items. If you would like to see all of the raw data, click on the analyze tab and then click on the button to the left that says "download responses." 1. Click on "All responses when asked Type of Responses. 2. Choose Format, answer "Excel" and then click on "condensed" and "numeric" (otherwise you get a lot of words that are hard to interpret.) You do not need to fill in an email address when prompted. Instead at the bottom of the screen, click on "request download." On the next screen, you might need to refresh and then click on 'download the data." You can sort the file to see who has responded and can code the qualitative data.

10. **Conceptualize and develop the kick-off Webinar** with the team. The kick-off Webinar should provide an overview of the purpose and objectives of the PLC, present research on the topic, and include the voice of at least one state early childhood specialist.
    The first Formative Assessment PLC began with a presentation from one of our expert consultant (Shannon Ayers), a response from a state administrator, and a reaction from Tom who was able to draw on his understanding of how states are supporting the formative assessment process.

11. **Determine the dates/times and duration of the PLC**. We recommend that the PLC convene monthly via GotoMeeting for 1.5 hours. Some PLCs change the date/time so that individuals who have other regularly scheduled meetings can attend whereas others schedule the same date/time. By scheduling the same date/time there is less likely to be confusion.

12. **Schedule the Conference Line.** The PLC lead should coordinate with the logistical support person to schedule the PLC. The first step is to check the Wiggio calendar to make sure the CEELO conference number is not in use at the proposed date/time. Once the time is confirmed, the logistical support person should indicate in the Wiggio calendar that the conference line is in use.

13. **Once the dates/times are determined, the logistical support person should send a Save the Date email** to those who participated in the first Webinar and to the larger list. Use MailChip, which will help to determine who has and who has not responded.

14. **Schedule the GotoWebinar.** The logical support person should send a GotoWebinar registration to all individuals who expressed an interest in the PLC and a separate link to all panelists. GotoWebinar has a feature that allows for one persistent link to be used

for all monthly Webinars. The PLC lead should work with the logistical support person set up the GotoWebinar, to draft an email using MailChimp to all of those interested in joining, (the email should include information on How to Register for the call, and indicate that registration is required) and to review who has registered. The email should include details about GotoWebinar, the topic of the PLC for the month, any panelists who will be presenting, and the CEELO call in number.

15. **Develop the agenda for the meeting**. The PLC lead with the planning team should develop a detailed agenda for the meeting using the planning template. Each meeting should begin with a brief update on progress of the PLC since the last call, a review of the key people who are on the call (by position rather than by listing everyone), and an overview of the agenda. The PLC planning team should determine who will reach out to any SEA specialists who will be invited to be on the agenda, how they will be contacted, and when their decision to participate must be finalized. The agenda should be saved onto the PLC folder in Wiggio.

16. **Outreach to panelists**. The PLC lead or person from the PLC planning group should reach out to potential panelists and provide them with information about the PLC; the topic of discussion; and ask the panelist to develop materials (if necessary) or offer to develop slides on behalf of the panelist. If relevant, the panelist should be encouraged to share links to the state website and materials developed by the state.

17. **Develop materials for the meeting including Powerpoints and links**. The PLC planning group should develop a Powerpoint to guide the presentation. Images of presenters should be included and graphics should be embedded wherever possible to make the meeting more like an in-person conversation. Web-links and materials should also be included in Powerpoints. Materials should be saved in the Wiggio folder, indicating the date of the meeting in the name of the documents.

    Tips that should be included on all presentations include: 1) Request that participants hang up rather than hitting the hold button if they receive another call, so that the participants don't hear music in the background; 2) Technical requirements to be able to view the screen; 3) Notice that the call will be recorded for note-taking purposes only; 4) Contact email and phone number for person who can address technical issues; 5) Information about how the chat feature works.

18. **Send reminder email**. One week before the PLC meeting, the logistical support person should send a reminder email. If meeting materials are available at this time, these should be included in the email.

19. **Send Webinar link**. One day before the PLC, the logistical support person should send the GotoWebinar link to all who registered. If meeting materials are available at this time, they should be included in the email.

20. **Log onto the conference line and Webinar 15 minutes early on the day of the meeting.** For at least the first 3 meetings of the PLC, it is important that the PLC lead and logistical coordinator log onto the Gotomeeting site at least 15 minutes prior to the start of the call to ensure that the technology is working appropriately and the conference line is working.

21. Facilitating. MEETING FACILITATOR'S ROLE [More details available at end of guide.] The job of a "Facilitator" is more of the "conductor" than a participant during the meeting. You direct the flow and energy during the meeting, to enhance and focus the wisdom and knowledge that lay dormant in most groups. The facilitator 's mission is to support everyone to do their best thinking. Before the meeting, the facilitator should understand the agenda, time limits, technology needs, and goals of the meeting.

During the meeting, the facilitator should create a warm, friendly atmosphere, and encourage group member participation; discuss the agenda and participants, make note-taking and place for resources clear; start on time and maintain time limits; keep the discussion on track and focused, but revise as necessary to suit group needs; ask open-ended questions and encourage all to participate; request feedback; summarize and help with identifying next steps.

Facilitators are NOT

- A group member
- Not responsible for the content of the group's decision
- Not a clerical or errand person for the group
- Not an intermediary between the group and the larger organization
- Not a mediator, arbitrator, or judge
- Not responsible for making decisions or resolving conflicts

Some tools facilitators can use to move conversation and work include:

- Paraphrasing
- Drawing people out
- Mirroring
- Gathering ideas
- Stacking
- Tracking
- Encouraging
- Balancing
- Making space
- Intentional silence
- Listening for common ground

22. **Develop meeting notes**. The logistical support person should keep a running record of the meeting, noting who is asking questions and the answers that are provided. The meeting notes will be shared only with PLC members. The notes are not intended to summarize key themes, but rather to provide information to participants about who

asked questions, what issues are being considered, and what steps the PLC plans to take to address issues in the future.

23. **Create a secure section of the CEELO website for the PLC**. Contact Jana to create a secure section of the CEELO website for PLC members only. This section is closed so that participants can share drafts and engage in an open discussion. The home page should be viewable by the public and should include a link to the PLC coordinator's email, letting people know that if they are interested in joining, they should contact that person. The categories for the PLC that are recommended are as follows: a) Monthly calls – organized chronologically, which includes Powerpoints, materials and notes; b) Resources – documents prepared by national organizations, participants in the PLC, and states. These can include drafts of policies, guidance, regulations, etc. that members want to share with one another; c) discussions – threaded discussion of key topics that is moderated by the PLC lead with the logistical contact assisting with Web 2.0 technology to support the interactive nature of the discussion; d) Key contacts—list of participants in alphabetical order with agency name and email address. The logistical support person should update the members' only page on a regular basis. The PLC lead should determine the timeframe for updating the information, but it should, at a minimum, be updated soon after every call.

    We will send a link once the Formative Assessment PLC members only page is built.

24. **Develop and implement a dissemination strategy**. Develop a strategy for disseminating information about the PLC based on the topic, the members' interest in expanding the community, and possible wider interest. One possible strategy is to develop a card with the key contact's name and brief information about the PLC and encourage CEELO leads to hand out the card at conferences where possible. Another is to email possible participants on a regular basis. A third targeted strategy is to encourage members to reach out to others within their states and existing networks. CEELO should provide members with emails and information so that the outreach they engage in is easy.

25. **Give PLC members access to the members-only portion of the CEELO website**. The logistical coordinator should email all participants with the password and information needed to access the members' only pages. Individuals should be given access only after completing the Surveymonkey that asks background information.

26. **Edit meeting notes and post notes, Powerpoint, and to PLC section of the CEELO webpage**. Melissa will assist with uploading materials, but the logistical support person should compile all information on Wiggio.

27. **Post public documents to the CEELO site**. The logistical support lead should provide Melissa with all public documents that should be posted in the CEELO resources in the relevant section. For example, public documents on formative assessment should be posted to the assessment section of the resources.

28. **Evaluate the success of the PLC**. On at least an annual basis, develop a survey of members to assess the quality and impact of the PLC. Use the information both to track outcomes and to inform the future development of the community.

29. **Encourage members to meet in person at events where a significant number of members attend**. In addition to the virtual PLC, it is important for members to be able to meet in person. Consider events which a significant number of members are likely to attend, such as the annual roundtable, NAEYC, or SCASS meetings, and encourage members to get together for an early morning breakfast, a dinner, or during a time that is not scheduled. Such informal gatherings can help sustain the PLC.

30. **Determine whether the PLC should continue, or the work of the community is complete**. It is important that the objectives of the PLC are clearly articulated at the inception of the community and re-visited periodically. Members of the PLC should engage in a conversation at least annually about whether the current community has achieved all of the initial goals and whether the members should continue to convene to achieve new objectives or conclude.

Facilitation Details:

FACILITATOR'S ACTIONS BEFORE THE MEETING

- Coordinate with Leadership Team to obtain copy of the agenda, relevant background material, and Powerpoints from presenters (if applicable)
- Indicate next to each item whether it is for information, for discussion or for decision.
- Set a time limit for each topic and adhere to it. Give presenters 5 minute warning and 1 minute warning. If presenters go over allocated time, let them know that the next speaker will now be presenting.
- Arrange in advance for audio-visual equipment, flip charts, markers and other supplies. Coordinate with Kimberly to obtain all needed materials.
- If possible, arrange the room so that members face each other in a circle or semi-circle. For large groups, try U-shaped rows.
- Arrive early to set-up
- Provide name cards for presenters
- Have extra copies of the agenda and background materials.

FACILITATOR'S ROLE DURING THE MEETING

- One of your most important roles is to create a warm and friendly atmosphere so members feel free to express themselves.

- Be interested and enthusiastic. Enthusiasm can be contagious. Have a positive attitude!
- Coordinate with the person taking minutes. (See note taker guide). Introduce note taker during introductions and let audience know that the meeting notes will be posted to the CEELO website.
- Start on time even if people are still coming into the room.
- Review and revise the agenda if necessary
- Keep the discussion on track and focused on the topic. The agenda will drive the discussions.
- Feel free to ask for only constructive and non-repetitive comments. Tactfully end discussion when they are getting nowhere or becoming destructive or unproductive.
- Pace the meeting and observe specified time limits for agenda items. This will allow everyone a chance to speak and helps insure that all issues on the agenda are covered. However, be sensitive to the need for discussions. Allow the group to talk things through. If they want more time to discuss an issue, adjust the agenda. Recognize when there is consensus and move on.
- Be gentle but firm with people who speak too long or get off the subject. A simple "let's move on" or "thanks, now let's hear from someone else" can be very effective.
- Call group members by name. This personalizes the discussion and also assists the recorder in accurately noting who shared their opinions.
- Avoid stating that a person is wrong for any idea or opinion that is expressed. Ask for other comments and ideas on the subject. Remain open-minded and democratic. Allowing the free flow of expression allows for creative thinking.
- Ask open-ended questions to stimulate discussion using "why" and "how." Ex. “How do you think that will impact the project?” vs. “Do you think that will impact the project?” – which may result with just a "no" or "yes" response.
- Listen carefully to each person. Make sure you understand what the speaker is saying. If you're unsure, try restating it or ask the person to clarify.
- If someone suggests something or volunteers to do something, ask them to identify the next step and ask them to commit to taking it on and reporting back to you by a certain date. Ask what they need from you to fulfill what they've committed to. Make note of their needs and follow up after the meeting or the next day.
- Encourage feedback. Ideas, activities and commitment to the organization improve when members see their impact on the decision making process.
- Be certain that the entire group is involved in the discussion. Encourage everyone to speak by simply asking those who haven't spoken for their opinion on the issue at hand.
- Be aware of people who look confused or lost, and restate questions or ideas. Summarize key points when necessary.

- If problems arise, remain neutral and calm. Call on members for assistance and resolution – it shouldn't all be on your shoulders.
- Use appropriate humor– it can release tension and get people talking

FACILITATION SKILLS AND TOOLS
Facilitation is like dancing. If your mind wanders, you miss the rhythm and trip.

Skills
- Trust the Group
- Honor Each Group Member
- Keep the Group Space Safe
- Remember that Beginnings Are Crucial
- Take Everything That Occurs As Relevant
- Work With Conflict
- Be Awake
- Be Yourself
- Use Questions and Suggestions
- Negotiate
- Be Culturally Sensitive
- Improvise
- Acknowledge and Affirm
- Keep Intervention to a Minimum
- Monitor the Energy Level
- Seek Agreement
- When in Doubt, Check it Out
- If You Don't Know, Say So
- Invite Feedback
- Record Correctly
- Remember Synergy

Facilitators are NOT
- A group member
- Not responsible for the content of the group's decision
- Not a clerical or errand person for the group
- Not an intermediary between the group and the larger organization
- Not a mediator, arbitrator, or judge
- Not responsible for making decisions or resolving conflicts

TOOLS

Paraphrasing

Paraphrasing is a fundamental listening skill. It has a calming effect and a clarifying effect. It reassures the speaker that his or her ideas are worth listening to. An it provides the speaker with a chance to hear how his/her ideas are being heard by others. Paraphrasing works well when supporting people to think out loud.

Drawing People Out

Drawing people out is a way of supporting people to take the next step in clarifying and refining their ideas. It sends the speaker the message, "I'm with you: I understand you so far. Now tell me a little more." It also says, "take your time and get your idea all the way out."

Mirroring

Mirroring captures people's exact words. Some people need this degree of precision in order to feel that they are truly being heard. Mirroring the speaker's words and mirroring their tone of voice are two different things. You want your tone of voice to remain warm and accepting. Mirroring works well when facilitating a brainstorming process.

Gathering Ideas

To help a group build a list of ideas at a fast moving pace, you want to gather ideas, not discuss them. Effective gathering starts with a concise description of the task. For example, "For the next ten minutes, please evaluate this proposal by calling out pros and cons. First I'll ask for someone to call out a pro reaction. Then I'll ask for a con and so on. We'll build both lists at the same time."

Stacking

Stacking is a procedure for helping people take turns when several people want to speak at once. Stacking lets everyone know that they are, in fact, going to have their turn to speak. So instead of competing for airtime, people are free to listen without distraction.

Tracking

Tracking means keeping track of various lines of thought that are going on simultaneously within a single discussion. People often act as though the particular issue that interests them is the one that everyone should focus on. Tracking lets the group see that several elements of the topic are being discussed, and treats all as equally valid. Tracking relieves the anxiety felt by someone who wonders why the group isn't responding to his/her ideas. The facilitator indicates that s/he is going to step back from the conversation and summarize it.

Encouraging

Encouraging is the art of creating an opening for people to participate, without putting any one individual on the spot. This is a way of involving everyone. For example: "Who else has an idea?" "Let's hear from someone who hasn't spoken for awhile.", "Joan/Jim could you share your perspective on that point."

Balancing

The direction of a discussion often follows the lead set by the first few people who speak on that topic. Using balancing, you help the group round out its discussion by asking for other views that may be present but unexpressed. Balancing undercuts the myth that "silence means consent." It provides welcome assistance to individuals who don't feel safe enough to express views that they perceive as minority positions. It helps send the message that "It is acceptable here for people to speak their mind, no matter what opinions they hold." For example: "Okay, now we know where three people stand: does anyone else have a different position?" "Are there other ways of looking at this?", "Does everyone else agree with this?"

Making Space

Making space sends the quiet person this message: "If you don't wish to talk now, that is fine. But if you would like to speak, here's an opportunity." Some people habitually keep out of the limelight because they are afraid of being perceived as rude or competitive. Others might hold back when they're new to a group and unsure of choice about whether and when to participate.

Intentional Silence

Intentional silence is highly underrated. It consists of a pause, usually lasting no more than a few seconds, and it is done to give the speaker that brief extra, "quiet time" to discover what they want to what's acceptable and what's not. Still others keep their thoughts to themselves because they're convinced their ideas aren't as good as those of others. They can benefit from you making space for them to participate. Invite them to speak. For example, "was there a thought you wanted to express?" or "Did you want to add anything?" or "you look like you might be about to say something…". If they decline, be gracious and move on. No one likes being put on the spot and everyone is entitled to make his/her own say. It can also be powerful when a group member's remark seems too pat, too easy. Your silent attention allows that person to reflect on what she/he just said, and express his/her thoughts in more depth. Five seconds of silence can seem a lot longer than it really is. It can feel awkward and learning to tolerate it is an important listening skill. With eye contact and body language, stay focused on the speaker. Say nothing. Just stay relaxed and pay attention. If necessary, hold up a hand to keep others from breaking the silence.

Listening For Common Ground

Listening for common ground is a powerful intervention when group members are polarized. It validates the group's areas of disagreement and focuses the group on their areas of agreement.

This is a tool for instilling hope. People who believe they are opposed on every front may discover that they share a value, a belief, or a goal. Summarize the group's differences and similarities. Note areas of common ground and check for accuracy. For example: "Let me summarize what I'm hearing from each of you—I'm hearing a lot of differences but also some similarities. It sound like one group wants to leave work early during the holiday season, and the other group would prefer to take a few days of vacation. Even so, you all seem to agree that you want some time off before New Year's. Have I got it right?"

(Facilitation Skills: Bill Cook

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