

# THE ART OF LEADING A WORKSHOP



*HAVE YOU EXPERIENCED THESE FRUSTRATIONS?*

- 
- pointless group activities
  - pointless icebreakers
  - one person talks too much
  - ends late
  - not enough time
  - too much lecture
  - starts late
  - feels incomplete
  - not enough guidance
  - fuzzy objectives
  - glitchy powerpoint
  - too much side chatter
  - all activities are rushed
  - poor sound
  - participation out of control
  - horrible ambient noise
  - uncomfortable small-group activities
  - doesn't feel safe
  - endless introductions

***IF SO, THEN TRY THESE TIPS -->***

# THE ART OF LEADING A WORKSHOP

*A workshop is a gathering in which too much material must be presented in too little time.*

*At a workshop (!) on March 26, 2023, at Sharing the Fire (the annual NEST conference) in Portsmouth, New Hampshire, fifteen storytellers combined their wisdom and experience to offer their best tips about the art of leading a workshop. By definition, the workshop was too short to cover the topic. But we offer our colleagues these bits and pieces.*

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*Important! This is a random collection of tips! Don't think of it as a recipe for a single successful workshop – it's more like ingredients stored in a pantry for different kinds of meals. Look over the collection with an eye to your own preferences and the nature of your prospective workshop, and we hope you will find ideas that will come in handy for you.*

*We offer tips in eight categories:*

- 1. Planning the workshop in advance*
- 2. Integrating participants at the beginning*
- 3. Introducing the workshop to participants*
- 4. Conducting discussion to encourage general participation*
- 5. Using small-group discussions successfully*
- 6. Managing time*
- 7. Bringing the workshop to an end*
- 8. Adapting techniques for online workshops*

## **1. PLANNING THE WORKSHOP IN ADVANCE**

*Success starts with planning ahead. We all do this on our unique schedules and in our own ways, but here are a few tips that various among us have found helpful.*

- Find out all you can, in advance, about your audience. (How many will be there? What is their relationship to your topic?)*
- Test exercises and activities in advance to see if they work and how much time they require.*

- As you write your notes for the workshop, mark each segment with the time when you intend it to begin, so that you will know how close you are to meeting your time plan. (e.g. “10:15,” “10:25,” “10:55,” etc.).
- As you plan your workshop, assume that you will begin 5 minutes after the stated opening time and end 5 minutes before the stated end. (This gives you a cushion that allows for late-comers straggling in, lengthy introductions and public announcements, and, at the end, evaluations (if any) and private questions to you.)
- Test all electronics in advance -- and make sure you'll have internet in the workshop space if you hope to use it.
- Make a checklist of items you need to bring!
- If you're flying to the workshop site, don't check your workshop materials in your luggage; pack them in a carry-on.
- Identify in advance the support person for the event/facility in case of a problem with the space or the tech.
- Visit the workshop space in advance to walk the room, note/plan chair arrangement for different activities, check ambient sound and light, learn how to adjust temperature, make sure necessary equipment is present.

## **2. INTEGRATING PARTICIPANTS AT THE BEGINNING**

*How do you weld a group into a purposeful community at the beginning of a workshop? What are some efficient ways to draw together the participants at the beginning and bring them and their diverse experience into relationship with the workshop topic?*

Get to the site early; as people arrive, greet them individually and chat till opening time. Whatever opening activity you choose, make sure you state clear boundaries of time/topic.

- If you want to devote no more than a couple of minutes to this segment of the workshop:
  - Pass around name-tags and markers.
  - If you want to have participants introduce themselves, instruct them to limit themselves to their name and a single phrase or word (e.g. where they live; or something that connects them to the topic of the workshop). Model what you want them to do – and emphasize brevity – by demonstrating it yourself.
  - In order to find out the range of interests or backgrounds among your participants, use an oral questionnaire they can respond to by raising their hands. (“How many of you are \_\_\_\_ / are involved in \_\_\_\_ / are interested especially in \_\_\_\_”)
- If you are willing to spend more time on this introductory process, try any of the following depending on how much time you have:

- Invite participants to introduce themselves to the group with fuller statements about their connection to the workshop topic.
- Invite participants to introduce themselves to each other in pairs, and then to introduce their partner to the whole group. (Must specify that they will be introducing their *partner*, otherwise folks tend not to listen but wait for their turn to talk.) Be sure to limit the time for this!
- Create an icebreaker activity for the whole group. Make sure that it is relevant to the workshop topic and advances the group toward its purpose.
- Dealing with latecomers:
  - Ask your room host (if you have one) to take latecomers aside and brief them on what they have missed.
  - If the workshop activities are sequenced to build on each other so that latecomers will not be able to participate well or will disturb others' progress, set a cutoff time for late arrivals and stick to it. Notify participants of this in advance.
  - When latecomers arrive, don't stop and repeat much that you have already said.

### **3. INTRODUCING THE WORKSHOP TO PARTICIPANTS AT THE BEGINNING**

*This is the moment to set up the workshop for success – by introducing yourself and your relationship to the topic, by making sure participants know what's coming, and by presenting necessary information about procedures.*

- Introducing yourself and your relationship to the topic:
  - If this has not already occurred in a host's introduction of you, introduce yourself to the group by telling them only what is truly important for them to know about you and the present topic.
  - If you have time and if it's relevant, you can create a closer relationship to the group by telling a very brief personal story about your own experience with the topic. (Do this *after* the group introductions, or everyone will want to tell their life story.)
  - Set the tone and energy level intentionally at the beginning.
- Orienting participants to what's coming:
  - Say something about why you feel the workshop's topic is important.
  - Stress the objectives ("by the end, we will have . . .").
  - Present an agenda for the workshop in writing, either as a handout or on a flip chart; go over it briefly, mentioning different techniques or activities participants will experience. Check in: "*Okay? Any questions?*"
  - If you will be giving out handouts later in the workshop or at the end, let the participants know this.

- If it fits with what you are planning and you will be able to use the results later in the workshop, hand out cards and ask participants to write anonymous answers to a question.
- Giving necessary information, “housekeeping rules”:
  - Make sure participants have any equipment they’ll need (pens, paper, anything you’ve asked them in advance to bring).
  - Notice and welcome any participants who may have accessibility needs and make sure these are accommodated.
  - Make clear whether or not recording will be permitted.
  - Introduce a signal by which you will get the group’s attention (ringing a bell, flashing lights, drumming, etc.).
  - Mention other useful information (e.g. where the restrooms are, how/when to take notes, if/when there will be a break, where to put gear if furniture will be moved).
  - Make a safe space: Ask participants to make a confidentiality agreement if personal stories are to be told; this can be oral, not written.

#### **4. CONDUCTING DISCUSSION TO ENCOURAGE GENERAL PARTICIPATION**

*How can we engage all members of the group in our presentations? How can we make sure that all will have opportunities to join in the discussions? How can we foster a group culture of respectful, thoughtful collaboration?*

- If you ask a probing question, pause to give time for thought; be comfortable with the silence.
- Acknowledge multiple respondents by naming the order in which you'll call on them ("one, two, three...", or their names if you know them).
- If someone is volunteering so readily that others' comments are squeezed out, announce that you're going to pause for a moment after the next question, so that some people who want a little more time to think can take part.
- If the above tactic doesn't work, find the opportunity to take the persistent talker aside and ask her/him to collaborate with you in encouraging/making room for other participants to speak.
- If some members of the group haven't joined the general discussion, encourage them. *"I'd love to hear from some who haven't had a chance to speak yet..."*
- If participants are reluctant to enter the discussion, give them 2-4 minutes to discuss a question with their neighbors in pairs; then debrief with the whole group.
- If you are calling on participants one after the other around the room, don't put anyone on the spot: make it possible for people to "pass," or pass and respond later.
- Be vulnerable yourself, by offering an example, to encourage others to take risks and be vulnerable.

- If the discussion is getting repetitious, ask for new feedback and request people not to repeat what others have said
- Make the space feel safe. *“This is a no-judgment zone!” “We’re not looking for right answers; we’re exploring ideas”*

## 5. USING SMALL-GROUP DISCUSSIONS

*Often the best way to show participants how things work is to give them a chance to try out techniques with one another. Sometimes the best way to make sure that everyone has a chance to engage in the discussion is to create smaller groups – but only if those groups are focused and set up effectively.*

- If you will be dividing participants into small groups, you might give each person a colored sticker at the beginning of the workshop that will mark them for particular groups later on.
- Make sure the small-group task fits the time.
- If participants are going to be moving their chairs to form small groups, have them do this before you explain their task. Once the groups are settled and quiet, then give instructions. (They’ll remember them better.)
- You might put instructions on a flip chart or white board, for reference during the activity.
- Consider accessibility: some people may need extra time to move physically to their group.
- Tell the groups clearly what their goal is and how they are to go about it. Ask: *“Does everyone understand what I want you to do?”*
- If the groups are to report back to the whole after the exercise, have each group pick a note-taker and a reporter (who may be, but need not be, the same person as the note-taker).
- Tell them how long they will be working together; have each group choose a time-keeper. If group members are to take turns, ask the time-keeper to make sure each person has equal time.
- When they are applicable to all groups (or pairs) simultaneously, give time cues yourself. *“Time to move on to part B...” “Time to switch roles!”*
- As the presenter, visit each group to make sure they’re on task.
- If there’s a chance that groups will not have finished all possible details of their tasks when time is up, reassure them. *“What you have now is good enough.”*
- At the end of the small-group exercise, when the large group comes back together, be sure to comment on the exercise and connect it to the overall goals of the workshop, whether or not each group reports to the whole gathering.

## 6. A FEW TIPS ABOUT MANAGING TIME

*Of course – practically by definition – all workshops on a worthwhile topic don't have enough time. How do we conduct them, then, so that at the end, participants feel fulfilled more than frustrated?*

- Before the workshop:
  - As you plan the workshop, seed your notes with time markers to tell you when you need to move on to the next step.
  - Plan for transition times between activities (especially, plan time to allow small groups to return to the whole).
  - Test exercises beforehand with a group of volunteers, if you can, to see how long they take.
  - Think in advance about segments of the workshop you can omit if other segments take longer than you anticipated; plan transitions to allow for this adaptation. (Not just... "Oops, no time for X, so we'll go to Y...") If you can, prepare longer and shorter versions of some activities to adapt to time constraints.
  - When you can (and when it's appropriate), in advance of the workshop send participants handouts or readings. Tell them what is or is not mandatory to prepare or read in advance.
- During the workshop:
  - Set clear boundary times for exercises and activities.
  - Have a clock available (if there isn't one in the room) to keep people aware of time.
  - Use a signal (perhaps a bell, a drum, or flashing the lights) to call people together after they have been talking in small groups.
  - Keep individuals' contributions time-limited. "I'm going to stop you there, so others can give feedback/because we need to move on."
  - If a segment takes more or less time during the workshop than you anticipated, jot yourself a note so you'll remember that for the next time.

## 7. BRINGING THE WORKSHOP TO AN END

*How do we end a workshop so that it feels complete?*

- Activities
  - Initiate a culminating activity, if appropriate; e.g.
    - brief presentations using skills from the workshop;
    - asking participants to comment on what they'll take away;
    - encouraging participants to plan their next steps.
  - Summarize, briefly, what has been covered.
  - Tell a story or read a poem.
  - Give a sticker that participants can wear to identify other participants during the conference so that they can keep in contact with each other.
  - Is there a way for participants to keep in touch with each other in the future?

- Announce a possibility of reconvening the group in the future, in person or online.
- Tell participants where they can continue to learn about the topic: give handouts, provide online links (be sure you've tested the links to make sure they are current!). If participants have recommended links or other sources during the workshop, find a way to share them: in a flip chart, Google Drive, etc.
- Tell participants whether you will be available for further discussion or consultation, and if so, how. (You might put your contact info on the handout.)
- If applicable, make sure participants know how and where CEUs will be available.
- Evaluations:
  - Pass out evaluations or explain online evaluation process (delegate this to an assistant or the room monitor, if there is one).
  - Pass out cards for a "3,2,1 evaluation":
    - Something you have learned
    - Something you want to know more about
    - Something you will do this/next week
  - Ask one thing they found useful and one suggestion about something that would improve their learning. These questions can be answered anonymously on index cards handed out and collected at the end of the workshop.

## **8. ADAPTING TECHNIQUES FOR ONLINE WORKSHOPS**

*The Covid pandemic brought us the (mixed) blessing of conducting workshops online. Even though many people are now familiar with remote meetings and gatherings, it is still often necessary to remind or instruct workshop participants – and ourselves – about effective ways of communicating online.*

- Plan to explain Zoom (or other software) techniques to make sure everyone is able to take part. If possible, announce that those not very familiar with Zoom sign in 30 minutes early for a refresher/tutorial.
- It's wise to team up with a tech host who can admit participants, troubleshoot issues, and communicate through private chat with participants who need tech assistance.
- If you have more than 25 participants (including you) in your session, consider that you can change your gallery view in Settings from the normal 5 frames X 5 frames to see 7x7 (49) frames instead on the same screen, provided your computer has the specs to handle this option.
- Request that participants use the "raise hand" feature if they want to speak (so you can see them readily, since this will move them to the top left of the screen).
- Request that participants rename themselves on their screens, if necessary, to show their names correctly. You or your tech host can also rename any participant(s) (preferably with their permission!).



- If you will be asking participants to work in pairs or small groups, study in advance (and practice!) the various ways to set up, fill, end, and time breakout rooms. Allow a couple of extra minutes in the workshop to set these rooms up and to explain them to participants.
- Put the breakout rooms' instructions in the Chat so they'll be visible during activities.
- Announce your policy: Do you want participants to leave their video on? Do you want them to mute their mics when they are not talking to the group?
- Prepare in advance for the possibility that you may have participants who phone in and therefore have no video and cannot see others in the group.
- If you or participants will be putting useful information into the Chat, be sure to tell participants to save the Chat (and how to save the Chat) at the end of the workshop.