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Set the Stage

Miranda parked her car in one of the last slots available, grabbed her purse and notebook, and ran into the building. The workshop was slated to begin at 9:00 a.m. It was now 9:01. Miranda hurried down the hallway to the multipurpose room and stopped in the doorway. There was music playing, and everyone was standing and walking around the center of the room. Someone met her at the door and pointed to an empty chair along the wall. All the chairs were lined against three walls—and there were no tables in the room. Miranda put her purse and notebook on the empty chair and went to find a partner. By that time, everyone was pretty well paired up, and the workshop facilitator, who was standing on a two-step stool of some sort, stopped the music, raised his hand, and said, "Pause; look this way, please!" Miranda had partnered with a high school teacher whom she knew, and they both turned to face the facilitator.

We are creatures of habit, and this applies to teachers as much as anyone else on the planet. Mention the word *seminar* or *workshop* to the average teacher, and her mind may well trigger images of a large wooden lectern with a microphone, a reading lamp, and a presenter all attached to it. This mental image may also include educators sitting at tables or desks, in passive mode, ready—given the slightest chance—to go to a better place in their minds. Educators enter the room with these images firmly locked in their minds because, over the years, they have become used to sitting, listening (or pretending to listen), watching an electronic slide presentation (or watching the presenter read slide after slide), and silently willing the hands on the wall clock to move more quickly. They expect what they expect, and they prepare for it in advance.

I once had a workshop participant explain that she had driven two hours to get to the session, and during the long drive she *steeled herself* to sit in a back corner of the lecture hall, stay awake, and attend to her knitting and a good novel for four hours of lecture. She knew from experience what was coming, and she was prepared to deal with it in her own way. She could get through it and, as she told me, *survive* the experience.

She arrived to find that I had blocked off all the auditorium seats, except for those front and center. There were colorful posters on the walls; upbeat music lifted the mood; and I greeted everyone as they entered. I took the opportunity to talk to participants as they came in or once they were seated, and she realized her preconceptions did not match the reality of this particular workshop. She loved it, and she thanked me for not doing what she was certain I was going to do—lecture for the better part of four hours. I didn't do that, and in spite of the fact that she still faced a two-hour trip home, she stayed to tell me how much she appreciated it . . . and how much she had learned.

Attendees and Participants

I love baseball. As a child, I enjoyed going to Municipal Stadium to see the Cleveland Indians play the New York Yankees. My father and grandfather were die-hard Indians fans, and they both hated the Yankees. We would drive to Shaker Heights, park the car, and take the streetcar into downtown Cleveland. With a single game or—better yet—a doubleheader in the offing, a wonderful afternoon of baseball stretched before us. Our intent was not so much to learn anything new; our goal was to be entertained by the excitement and the intricacies of the game. Late in the game, the announcer would inform us that "today's attendance is 50,456, and the Cleveland Indians ball club thanks you," or something to that effect. We were three happy fans among the 50,456 *in attendance* at the ballpark that day.

My point here is that we were *attendees* at the ball games; we were not participants. As much as I loved the game, and as much as I enjoyed playing Little League as a kid, I suffered under no illusion that Mel Harder or Birdie Tebbetts, managers for the Indians during those years, were going to send the pitching coach into the stands to find me and say, "Get suited up, Nash, we need you!" (The Indians were not exactly at the top of the American League, but they were not *that* desperate.) I understood my role as an attendee, and the

players understood their role as entertainers. We were all happy with the relationship; we were not always happy with the outcome of the game, *especially* if we were playing the Yankees.

There are times when I attend what I know is going to be a lecture. It is my choice, and once again, I fully understand my mostly passive role. If I listen carefully, I can learn a good deal, especially if I take a few notes. As with the Saturday afternoon ballgame in Cleveland, I know both the rules and the respective roles. The speaker will speak; I will listen; and we leave happy as long as the speaker sprinkles in some humor, tells some stories, and knows whereof he speaks. In those situations, I never aspire to be anything other than an attendee.

When the speaker gets rid of the lectern, moves out into the audience, and is relatively more animated, he shifts up one level to the role of presenter. A speaker moves to presenter when he involves the audience to a greater extent, perhaps by having them discuss something related to the content of the presentation. Both the speaker and the audience members are more active at this level, but the presenter is still doing 80% of the work. In this case, those in the audience are still attendees. During much of the session, they will still be doing their 20%; they have not evolved to the level of true participants.

In a workshop, however, the percentages shift radically. Members of a workshop audience should be doing 80% of the work, and a single session should be long enough (three to five hours) to accomplish something related to the workshop content. In a workshop, information flows not in a direct line *but in all directions*. Members of the audience will be conversing with each other in pairs, trios, and quartets. Following a 10-minute lecture by the person running the workshop, for example, they might stand, pair up, and share what they just heard or saw. They become far less passive and much more active.

If a workshop description promises that in this session, *we will discuss . . .* , or *we will explore . . .* , or *we will examine . . .* , my expectation is that I will be involved in the discussing, exploring, and examining. Too often, college course descriptions promise conversation and deliver a lecture. *In this course, we will discuss such and such* may well mean that *In this course, the professor will talk, and you will listen*. I completed too many college courses as an attendee and too few courses as a participant. I have *attended* more educational-conference sessions than I can count, and I have *participated* in too few. The difference between attending and participating is huge; those who actively *participate* in a workshop will walk away, I believe, with much more of value than those who simply attend.

Once again, anyone who is tasked with running a workshop for adults needs to consider that those coming to the workshop may have certain preconceived notions about what is going to happen. Over the years, I have had countless workshop participants tell me they expected one thing, and they were pleased to find something totally—and positively—different when they arrived. Most of the students and adults with whom I have worked over the past four decades would rather not sit and watch me work. The truth is that educators and students alike prefer to be actively involved in their own learning. We learn best by doing.

Speakers and Facilitators

I have been asked on occasion to "give a talk" on this or that topic. I either politely refuse those requests today, or I ask that the room be set up so that we can turn the lunch or dinner attendees into *participants* after the meal. Rather than talk to educators about ways to engage students in their own learning, I would much rather engage the educators in strategies they can then use with their students. I have seen too many people "give talks" that I wanted to give back when they were done. On the other hand, I have laughed until I hurt at luncheon or dinner speakers whose task it was to entertain. I may not have learned a good deal; but then, that is not why these speakers were hired. They were hired to entertain and provide much-needed laughter; in this, they succeeded admirably.

Speakers, lecturers, and humorists have their role in education. They can often inspire, and on occasion they can get the audience to think and reflect a good deal. In fact, if a visit by a noted lecturer is followed up with a few reflective sessions dedicated to using the presentation as an accelerant to learning, then this, too, adds value. In the absence of reflection, the lecturer's ideas will fade with time. The day after a lecture, reality sets in, and what has always been done continues to be done in a highly predictable fashion.

In setting the stage for success in any face-to-face workshop, it is necessary for those who will facilitate the session to plan for participants to move, talk, reflect, brainstorm, laugh, and purposefully interact with perhaps dozens of participants during the time they spend together. My experience is that those who show up at workshops—willingly or unwillingly—do not want to sit for two hours while someone stands at the lectern and imparts information from a slide presentation or a set of

prepared notes. That is, unfortunately, what their experience warns them to expect. When workshop facilitators shift the workload to the participants, involving them and engaging them in important content, I have found that almost everyone appreciates the change. Time moves at a steady pace, of course, but it can seem to drag or fly for a workshop audience—*and the facilitator is in control of how the participants view the passage of time*. The workshop facilitator who understands that adults need to be part of the action—and not part of the furniture—is far more likely to experience success.

Workshop facilitators working with teachers need to model the kind of content-delivery system that benefits students. After all, students don't want to be part of the classroom furniture any more than their teachers do when taking part in a workshop. The facilitator's primary function is to facilitate the learning for workshop participants in a way that will assist them in their own primary function—facilitating the learning of the students in their care.

Determining the Workshop's Purpose

Too often, teachers about to attend a mandatory workshop are a little fuzzy about why it is being held. It is not enough to say, "Well, don't worry about it; it will help you be a better teacher!" This is no more effective than saying to a student who is not clear about why he is studying one thing or another, "Well, don't worry about it; it is for your own good, and besides, this will be on the test!" Administrators and workshop facilitators working with and for them need to be clear as to why the workshop is being held in the first place. If a given workshop does not really fit into the strategic plan or what the building-level leadership team is working with teachers to accomplish, *it is better not to run the workshop*. I can remember a principal asking me if I would conduct a workshop for his teachers. When I asked what it was to be *about*, he said, "About two hours." He was throwing me to the proverbial wolves, and in doing this, he discounted the value of professional-development training in the building. My experience is that doing this time and time again for the *fad du jour* also builds a solid corps of cynics out of teachers who were not always so.

Providing a workshop in hopes it will result in something good is far less effective than having the faculty decide as a result of one or more collaborative conversations that there is some specific training that would, if used and evaluated by the teachers, result in permanent improvement. Any group of teachers and administrators that

comes to the conclusion that specific content-based or skills-based training is necessary is far more likely to approach it with a positive attitude. If one component of the professional-development plan involves a face-to-face workshop, it is then up to the workshop facilitator to provide training that goes far beyond the simple dissemination of information for three hours. Teachers who came up with the idea of the training *will know exactly why they are there*; the workshop's eventual impact will depend on what happens on that day and how what happened there is used by teachers in the following weeks.

Laying the Foundation

Those tasked with the facilitation of a workshop for educators should consider carefully where it will be held—and when. We'll talk more about distractions (room temperature, position of the sun if there are windows, distracting visuals, etc.) in Chapter 4. As facilitators search for a location for the workshop, here are some considerations that should serve everyone well:

1. *Find out how many participants are expected.* Facilitators should get a fairly accurate count of those who will actually be there for the workshop. Better to have too many handouts than too few. The size of the room needed for 22 total participants is different from that necessary for 55. The total number of faculty members may be closer to the latter figure, but do all 55 need to attend? Is it desirable for paraprofessionals to be there? Once the administration or leadership team makes that decision, the workshop facilitator can make the necessary decision as to which room in the building (or district) would be best.

2. *Make certain there is enough room for participants to stand, move, pair, and share.* Facilitators need to decide what kind of furniture is really needed for the workshop. If the type of training being conducted requires the use of rectangular tables, for example (six- or eight-foot), then it may be necessary to choose a room that permits the placement of tables in such a way that participants can still get up and move when necessary. I have found that using only chairs in a workshop where teachers are going to be standing, pairing up, and sharing on a regular basis is desirable. It allows for more room, and the chairs can be placed in rows or along the walls, opening up

the center of the room for movement. In Chapter 3, we'll look at several examples of effective room arrangements.

3. *Determine exactly what kind of electronic equipment is needed.* This needs to be decided well in advance, and workshop facilitators who are unfamiliar with the building need to acquire the most modern and efficient audiovisual (AV) equipment possible. We'll explore this in more detail later, but suffice it to say that facilitators don't want more equipment or less equipment than they need for the workshop. Clarity is called for here; otherwise, those in charge of technology may provide portable speakers, Internet access, an overhead, an Elmo projector, three extra extension cords, and a partridge in a pear tree—when all that is needed is a projector and a laptop. Again, clear communication here is desirable for both the facilitator and those charged with taking care of the facilitator's needs.
4. *If possible, arrange to visit the building and presentation room, and make an appointment to talk with those responsible for providing support.* I find it is helpful to spend some time looking at the room where I'll be presenting and talking to anyone who will be supplying me with what I'm going to need. Conversations should include one with the building custodian; the one most likely to be placed in charge of room setup. I always request that fewer chairs be set up than I think I'll need. I would rather add chairs if necessary than have empty chairs all through the audience. Facilitators who say, "Turn to someone near you and . . ." may find that there are so many extra chairs that people are sitting by themselves down front or in the back corner. I always have a stack or two of chairs sitting off to the side and I add them as needed.
5. *Determine exactly how much time you will have for the workshop*. Often, administrators or members of the leadership team will want to have a few minutes before a facilitator takes over; if a facilitator has determined in advance that she will need three hours (minus a 15-minute break), then it may be possible to arrange for a start time that is a bit earlier than originally intended. In Chapter 7, we'll discover ways to close powerfully, and I recommend that the last voice your audience hears is yours. Try to get the powers that be to keep to an agreed-upon minimum the number of minutes they have before turning the proceedings over to you. If there is a way for

administrators to give out the information via e-mail or at some other time, this is preferable, especially if the workshop is at the end of a long school day. I once had a building principal tell a long, sad story before introducing my co-presenter and me. At the end of his story, he said, "And we all know what happened to Custer! Now, here are our presenters." Try to be clear about who will say what by way of an introduction. I prefer not being introduced after someone reminds everyone where the restrooms are located. Arrange for someone to stand at the door at the beginning of the break, pointing everyone in the right direction to the restroom or the soda machines.

6. *Plan to introduce yourself at the workshop if possible*. I can only speak for myself here, but when I attended seminars and workshops, I wasn't much interested in having someone tell us how many degrees the workshop facilitator possessed or how much experience he had. A good facilitator will work personal information into the workshop. It is appropriate to reveal a little of one's personal and professional side within the context of the workshop itself. Workshop facilitators who are completely unknown to participants may want to provide the person who really wants to introduce them with a specific speech or set of talking points. Those who introduce facilitators may not have the facts straight—providing one more reason a facilitator may want to reveal her own personal and professional background.

7. *Make every effort to meet or talk with the administrator or leadership team involved with professional development at the school*. Workshop facilitators need to be certain about what to cover and what to avoid. Knowing what the administrators and faculty are emphasizing in their professional-development plan provides opportunities to reinforce those principles or concepts. There may also be minefields into which facilitators unfamiliar with the school or district do not want to step. A school that has had a bad experience with a particular program may still be recovering from what turned out to be a highly negative experience; the facilitator who brings it up, recommends it, or even mentions it may change the whole emotional tenor of the workshop *without even realizing what happened*.

8. *Facilitators who are from outside the school or district should take the time to meet key staff members in the building*. Members of the support staff normally play an important role in staff-development activities. In a school that prides itself on an all-inclusive

and ongoing continuous-improvement effort, everyone is involved. Workshop facilitators can learn much about the culture of the school by showing a genuine interest in what is going on. Custodians and office staff are likely to be directly involved in the workshop in ways related to logistics. If the workshop is being held for the teachers in a specific school, I often do a walkthrough with the building principal in order to get some idea of what the principal's vision is. These walking conversations through a building add context to what the facilitator is going to need to accomplish with the staff. Facilitators can use this time with those in positions of leadership to sharpen the focus on the day of the workshop.

9. *On the day of the workshop, facilitators should get to the site as early as possible*. When I conduct a workshop in a school beginning at 8:30 or 9:00 a.m., I make arrangements to arrive as soon as the custodians open the building in the morning. There is much to do, including setting up and *testing* the audiovisual equipment, checking the placement of chairs and tables, and moving around the room to various locations while running through whatever electronic slide show I am using that day. This last item is critical because participants need to be able to see clearly from every part of the room. If the screen images are too small, the inability to see it will contribute to a lack of clarity and some highly annoyed people.
10. *Pay close attention to the size and placement of the screen*. When arranging logistics with the school or workshop site, facilitators should request the largest screen the school or district can provide. I love to present in school cafeteria settings that have a ceiling-mounted screen above a stage. When workshop participants are standing, this kind of high screen placement is optimal because everyone can see the entire image without having to move to the left or right. If the screen is on the floor, facilitators can consider moving it to the stage or mounting it on a large table so that the resulting image is high enough. The keystone feature on most projectors will allow the correct adjustment of the image. In Chapter 4, we'll talk a bit more about electronic slide images, but the size and placement of the screen are critical to the smooth running of a workshop. Facilitators who give themselves time to deal with this can rest assured that participants will be able to see the screen from everywhere in the room.
11. *Ask for water to be made available for your use*. Hydration is important, and workshop facilitators are using tremendous

amounts of energy and liquids. I love seedless clementines, and I normally eat one or two before I present. It provides an energy boost; I also line up several glasses of water on a table in the front of the room. I also ask, on occasion, that bottled water be made available for the participants. Again, hydration is critical to the thinking process.

12. *Give some thought to where you will be most of the time during the workshop*. Check out the lines of sight from the row of chairs on the far left and far right. Avoid blocking the view of people in those rows; if *they* can see the screen or any charts you may have in the front of the room, then *everyone* can see. I spend some time sitting in these chairs, and then I place a small step stool in a position that is just to the left of center, but not in anyone's line of sight. When participants are standing and sharing, as they often are in my workshops, I either circulate around the room—listening to conversations—or I stay on that step stool. My music system is right behind me, and I can easily control it with my remote from that prepared position *chosen in advance of the workshop*.

13. *Overestimate the amount of time you will need to set up*. Nothing is more frustrating for me than to be setting up or working on something related to the workshop while people are arriving. In the next chapter, we'll emphasize the importance of greeting participants from the first one in the room to the last person with whom you chat just before you begin (at the appointed time!). Suffice it to say here that enough time should be allowed to handle unexpected logistical glitches. Below are some common problems that may develop.
    - A laptop that "goes to sleep" after so many minutes
    - A laptop that will not take your PowerPoint program
    - A screen that has not been put up and is discovered to be defective
    - A projector that is not bright enough
    - A light directly above the screen that washes out the image
    - A defective extension cord
    - Electrical outlets that do not work
    - An AV cart that is too high, blocking the view of several participants
    - A realization that the bells in the middle or high school will continue to operate all day long

14. *Bring a change of clothing*. I can remember having to completely reset a hundred or so chairs in the two hours before the workshop's start time. The screen would not pull down; we had to use a side screen, necessitating the shifting of every chair in the cafeteria. My shirt was soaked, and I had no replacement. I can report that this happened to me only once. I now have a complete change of clothing in the car at all times.

These are problems that are fairly typical and take the workshop facilitator's valuable time to fix. It is far better to discover something like this while there is still plenty of time to deal with it *before participants begin to arrive*.

There is so much to think about and do prior to the actual workshop. Planning is not everything, perhaps, but laying that solid foundation is necessary. I have been in workshops and conference sessions where it is evident that very little groundwork was done prior to the session. If participants sense that their time is not going to be well spent, or if they infer from the first few minutes of the workshop that things are not going to run smoothly from a process standpoint; they are much less likely to give the benefit of any doubt to the facilitator. They might very well pull their support entirely. I have seen this happen, and it is not pretty.

In order to assist facilitators with that first presession visit to the workshop venue, Appendix A consists of a 12-point checklist that can be used to make sure all the bases are covered. This is not to say that there are not more than those 12 considerations, but I believe I have listed most of the things that are critical outcomes for such a visit. Shifting to the day of the workshop, I maintain that getting to the site at least two hours in advance is never time wasted. Appendix B is a 15-point checklist for the day of the workshop, and it ends with greeting the very first participant. The first participant could come 30 minutes early, and I try to have everything wrapped up and otherwise functioning by that 30-minute mark.

Think Like a Participant

When I am creating a new workshop, I spend a good deal of time with a mental picture of my audience. Knowing they will appreciate being able to *move*, I create opportunities for them to do that. Understanding that people process information more completely when they have a chance to discuss it, I create opportunities to share. I know they will need a break or two, depending on the length of the workshop; I take

into account the number of participants the people in charge of the workshop told me are likely to attend. With large audiences, every restroom in the building should be made available for breaks. The larger the audience, the longer the break, if restroom access is a problem. Again, put yourself in the shoes of your participants during the planning and setup phases.

For workshop facilitators working with teachers for a full day, lunch may be provided on site by the administrators or leadership team responsible for the workshop. In this case, an hour is normally provided for the meal. Thinking like a teacher, I understand that teachers don't normally get more than 30 minutes for lunch (assuming a busy day actually allows them to use that time to eat!). I'll negotiate a 30–45-minute lunch, rather than an hour, in return for an early dismissal. Once again, I put myself in the shoes of a teacher sitting at the workshop with 35 minutes to go before the session resumes; this interrupts the flow of the workshop, and it may be unnecessary. Likewise, if an hour is provided for lunch, and lunch is "on their own," then it may be advisable to allow one hour and fifteen minutes for lunch, so that a group of participants in a busy restaurant is not trying to get the attention of a member of the wait staff in order to get the check.

Final Thoughts

I believe the roles of a speaker and presenter are substantially different from that of a workshop facilitator. This is not to say that a good facilitator does not need the skills of a powerful presenter; it does not mean they won't lecture on occasion; it does mean that the workshop workload is shifted from the facilitator (20%) to the participants (80%). In the vignette that opened this chapter, Miranda arrived a minute late, and everyone was already standing and pairing up for the first of many conversations. Great facilitators spend a good deal of preparation time thinking like participants, and planning an active, engaging, and ultimately useful workshop.

In Chapter 2, we'll stay with planning briefly, and then take a look at ways workshop facilitators can hit the ground running—on time and in good order—in ways that will inform your audience that this workshop will be different, interesting, exciting, productive . . . and fun.