Opening an Effective Learning Session

"An ounce of prevention (planning) is worth a pound of cure"

Use these opening steps to set the stage for an effective learning session:

Set the Context
What is the context, or environment, in which this session is taking place? What's the topic and how does it fit into participants' work? This is a time for the facilitator to bring everyone at the training to the "same page."

Introduce Your Role
Who are you? Why are you here? What role will you be playing? Why are you qualified to facilitate this session? What are you going to be doing and what do you expect from the group members during the session?

Introduce Group Members/ Icebreaker
Adults should hear their own voices in the first five minutes of your session. Have group members introduce themselves if the group is a manageable size. Have the group members "check-in." Consider doing this by asking the participants to share one word about why they are here or how they feel about being here. This will help you gauge the group and give you a general idea of who is in the group. Have an active icebreaker to get people talking and engaged.

Review the Objectives, Agenda, and Time Frame for the Session
What is the purpose of this training? What will be covered? Who will be responsible for each part of the agenda? How long will this session be? How long will be spent on each item? Will everyone be here for the entire meeting?

Explain the Process
What process and tools will you use to lead the group? How will decisions be made? How will ideas be generated?

Generate Expectations and Agreements
What does the group expect to accomplish by the end of the session? What agreements would the group members like to make in order to reach the expectations? Use the expectations and agreements to guide your time together.

Explain Logistics
Where are the bathrooms, water fountain, food, phones, etc.?

Seek Understanding and Agreement
Does everyone understand and agree to what has been proposed? Are there any questions or comments before beginning?