Facilitator Guide

Talk about making an impact! You are setting the tone for what we hope will be many years of rewarding involvement for your participants. ***Thank you*** for delivering this important service to our members.

These are the key concepts we want you to keep in mind as you deliver Member Orientation:

Best Practices: Helping adults learn is our *profession*, so we believe we should be modeling the current best practices of our field – particularly in something as foundational as orientation of our fellow professionals.

No Lecture: Seriously. We, of all associations, need to demonstrate effective, deliberate methods of helping fellow professionals learn. You will be sharing information as comments as you go along, not in long (or even short) monologues.

Action Mapping Model: We used Cathy Moore's Action Mapping model to build the content, organizing it around four questions.

1. What **business objective** does Member Orientation serve? (In this case: Increase participation rate in chapter offerings as a means of retaining members over time)
2. What **behaviors** get that result?
3. How can they **practice** those behaviors?
4. What is the absolute **minimum information** they need for successful practice?

Session Outline: Basically it all boils down to facilitating four activities.

Activity	Target Behavior	Rationale
Puzzles questions	Form relationships with lots of other members	*A happy, engaged, long-term member can walk into any chapter activity and recognize at least one other person by name*
Micro-scenarios	Select chapter offerings based on individual goals and circumstances	*A happy, engaged, long-term member selects chapter participation opportunities purposefully in light of her/his own professional and personal objectives*
Chapter basics *(If you run short on time, skip or dramatically shorten this one)*	Recognize key vocabulary and milestones of the chapter	*A happy, engaged, long-term member can at least recognize references to chapter administrative structures and history*
"Idea Builder"	Tap network of ASTD relationships to address real-world professional challenges	*A happy, engaged, long-term member turns to chapter contacts for help with challenges that arise in her/his career and readily offers such help to others*

What do they need to ~~know~~ do?

Session Preparation

Assumptions

- The session was designed with 10-20 participants in mind.
- The "default" set-up is 1-2 tables (end-to-end), with the presenter/s at one end. There should be plenty of space for groups to move around in the room.
- The "default" location for Member Orientation is the small room (with the fireplace) just off the main entrance to the Metropolitan Ballroom. Sometimes it is moved to the back of the main meeting room. Normally water and glasses are available to participants, but you may need to request it when you arrive on site.
- Ewald staff typically ensure that the materials, including an appropriate number of participant handouts and a sign-in sheet, are on site the day of the Orientation.

Your Role

Days before

✔ Confirm number of anticipated participants by contacting the ASTD-TCC office

(You may want to confirm the supplies you need at this time as well)

✔ Identify any adjustments you want to make to the outline

✔ Contact board members, if appropriate, to invite them to stop in at the end

✔ Recruit New Member Hosts if you choose to use them

Minutes before

✔ Start background music, if you choose to bring it

✔ Distribute handouts and puzzle pieces either as participants arrive or ready at each seat

✔ ***Have all participants sign in*** (so we can document their participation)

After

✔ Review feedback sticky notes

✔ Complete the Facilitator Feedback form so we can keep our materials/supplies current

✔ Return the sign-in sheet, Facilitator Feedback form, sticky-note responses and all remaining supplies to Ewald representative at the meeting

Supplies

At Minimum

- ✔ Ragged-start puzzles (6 four-piece puzzles)
- ✔ Participant handouts (black-and-white, two-sided copies, stapled upper left)
- ✔ Participation Opportunities cards (printed in color on card stock)
- ✔ Sticky notes
- ✔ Sign-in sheet
- ✔ Facilitator Feedback form

Optimal

- ✔ New Member ribbons (provided by Ewald)
- ✔ Pre-printed nametags for participants and facilitator/s (provided by Ewald)
- ✔ Blank nametags (provided by Ewald – ideally with thick markers)
- ✔ Signage (directions to room and identifier on door)
- ✔ Painter's tape to post signage
- ✔ Facilitator guide printout
- ✔ Optional: Background music for arrival time and as background to group activities (You'll need to bring your own music and the means to play and amplify it)

Acknowledgements

This version of ASTD-TCC's Member Orientation was originally written in 2007 by **Terri Cheney** and **Janel Holden**. Terri did this update in 2012. Questions, comments and suggestions are welcome.

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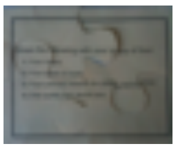
Detailed Session Outline

Action	Directions	Comments

Ragged start: puzzle activity
(as people arrive)


	• Have participants find people with the pieces that complete their puzzle; then flip the completed puzzle over and answer the questions on the reverse side in their groups of four.
	• Make sure each person gets a puzzle piece *as she/he arrives*.
	  ○ You decide how distribute them – already at each seat, laid out in a big random pile, handed out by you …
	  ○ If you have more participants than puzzle pieces, have stragglers join an established group as they arrive.
		• You should have a total of six identical, four-piece puzzles.
		• Note: The fourth question (a quirky fact about you) may appear "fluffy," but its purpose is deliberate. People are likely to forget the expected details of the first three questions. But if you learn that Joe is a professional opera singer on the side, not only will you probably remember the detail, you have an instant conversation starter next time you see him.

Quick welcome & introductions
(5-10 min)

	• At the scheduled start time, call the group to order and briefly introduce yourself.
	• Wrap up the puzzles activity.
	  ○ If necessary, give the small groups another few minutes to finish.
	  ○ Ask for 3-4 volunteers to share something interesting that came up in their small-group conversations.
	  ○ Do a "whip" in which each participant shares just their name and company with the large group.
	• Briefly explain the premise of the session:
	  ○ Following current best practices, including focusing on rehearsal opportunities and limiting or eliminating lecture.
	• Give participants about two minutes to write in their answers in the box on the first page of their handouts.
		• As the saying goes, you never want to punish the people who arrived on time by making them wait for those who did not.
		• Note: Asking people to share something "that came up" in their small groups allows for a bit of anonymity if people choose not to identify the source (even if it was themselves) of what they share.
		• Do take time for the whip, but emphasize speed. Unless the group is very small, do not ask all participants to share their puzzle answers with the large group. It tends to slow down the pace past the point of diminishing returns.
		• Throughout the session you may want to point out how you did a given activity and what makes it a best practice.
		  ○ For example, having participants explicitly identify their own intentions changes how they will listen and participate in the session.

Micro-scenarios: Maximize My Membership *(10 min)*	• Have participants form pairs or small groups, and assign them one or more micro-scenarios. • Point out the materials describing chapter involvement opportunities. Just	• There are, of course, no "right" answers. If a pair/small group misses what appears to you to be an obvious opportunity, just add it. ("Another thing Carlos might find interesting is

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<td>
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<td>like on the chapter website and other resources, the material is organized, but it is not linear. The objective is to identify several participation opportunities that appear to align with the circumstances and goals of their assigned micro-scenario.

• Give participants 3-4 minutes to identify their recommendations, then have them report back to the large group.

• After all the pairs or small groups have reported back, give participants a minute or so to identify 1-3 participation opportunities they will probably look into for themselves.
  ○ Ask for a few volunteers to share their plans with the large group.</td>
<td>________.”)

• You’ll need to keep the pace moving at a good clip, since it can get quite bogged down as people report their recommendations.

• NOTE: This is a good time to point out that committees and task groups in our chapter tend to seek out a mix of new and experienced members precisely because of the fresh perspective new members bring.
  ○ Point out that this fresh perspective is both valuable and short-lived, so we strongly encourage volunteering in some way as soon as feasible.
  ○ This is a good time to encourage participants to sign up as a meeting greeter or other “low-hanging fruit” volunteer role.</td>
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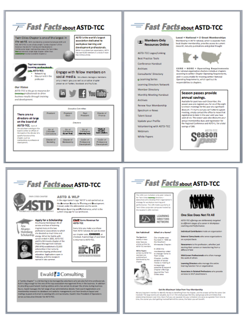
<tr>
<td>Chapter basics activity: Fast Facts
(10 min)
</td>
<td>NOTE: IF TIME IS GETTING AWAY FROM YOU, THIS IS THE ACTIVITY TO SHORT CHANGE. The others have a higher pay-off for the purposes of the session.

• Have participants pair up again, preferably with a different partner. (Remember that meeting and interacting with lots of different people is an explicit objective of the session.)

• Assign each pair only one page of Fast Facts.

• Give pairs 3-4 minutes to identify three things to highlight for the people not assigned that page.
  ○ In their opinion, what are the three most interesting or surprising or useful tidbits on their page?

• Ask each pair to highlight ONE item from their assigned page with the rest of the group.</td>
<td>• If you do skip or skimp on this activity, you should still point out the relevant pages in their handouts. Explain that the content is worth reviewing (and, if appropriate, that you are available for questions about it after the session), but you can provide more value from their precious face-to-face time by going on to the last activity.

• Doing the prioritizing matters! It takes considerably more brain power (engagement) to compare and rank the relative value of the facts on the assigned page than simply reading them. Sharing them aloud also demands engagement with the content.</td>
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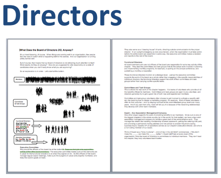
<tr>
<td>Article: Board of Directors
</td>
<td>Point out the article “What Does the Board of Directors DO, Anyway?” but do not take time to review it during the session.</td>
<td>• If you have a large group, you may choose to treat the two-page article as part of the Fast Facts activity.</td>
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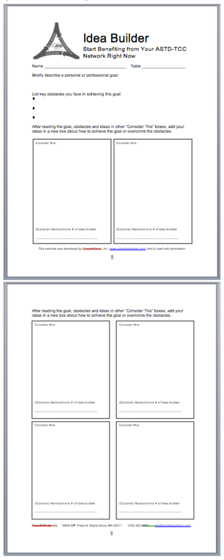
"Idea Builder" activity
(10 min)

	• Have participants tear off this last double-sided page of their handouts and complete the first portion: Name, challenge and obstacles.
	  ○ Be sure to point out that they will be passing this around to other people to read.
	• Have participants exchange their Idea Builder page with anyone else at the table.
	  ○ For the initial exchange, you can choose to do this by having everyone pass their page clockwise four people.
	• Participants should review the challenge and obstacles of the page in their hands, then start writing their suggestions in the first box at the bottom of the page.
	  ○ Point out that they can choose to provide their name and contact info if they like – or withhold it.
	• When they are done writing their suggestions in the first box, they should trade pages with someone else and repeat the previous step in the next open box on the page they are holding.
	• Participants will certainly not have as much time as they like on this. Be sure everyone's Idea Builder page has at least two boxes filled before you end the activity and return the pages to their originators (whose name is on the page).
		• Since people write at such wildly different rates, the most effective way of timing exchanges tends to be the following:
		  ○ "As soon as you are finished writing, hold your paper up and make eye contact with someone else who is ready to exchange pages with you."
		  ○ To get the group to wrap up the activity: "As soon as you are finished writing whatever section you are working on right now, return the page to the person whose name is on the front."

Quick evaluation: +/Δ
(2-3 min)

	• Have participants use one sticky note per response to answer two questions:
	  ○ What was the most useful/valuable part of this session for you?
	  ○ If you were mandated to change one thing about the session, what would it be?
	• Be sure to designate where they should post their "best" and "change" notes.
		• This method has proven to be the best way to collect genuinely useful feedback in the least amount of time.
		• "If you were mandated to change one thing" language has proven to be an effective way around Minnesota-nice reluctance to criticize. ☺

Strong close	• Before you dismiss the group, be sure to provide a clear close, even if it is simply a summary statement of how much they	• "Oh, my! Look at the time!" or "Please put your evaluations over here on your way out" is such a weak way to end a session. Feel free to use your own

	will value their membership. ○ You could ceremonially distribute New Member ribbons at this point. ○ You could end with one or both of the optional items below.	favorite close that reflects the professionalism of the organization.
OPTIONAL CONTENT *This takes preparation in advance, and you will probably need to trim the basic content in order to add it. But if you can offer one or both of these, participants report that they value it.*		
Board member introductions	Most board members are happy to pay a visit in person toward the end of the session, particularly if you specifically invite them ahead of time by phone or email. **Short version:** Ask the board member to take no more than 1-2 minutes to give their name, role and one key message of their choice to participants. **Longer version:** Have participants turn to the board-structure page in their handouts. Ask the board member to give only their name, then to provide hints about their board role that will allow participants to *guess* what their title is. The board member can draw this out and ham this up as much as seems appropriate at the time.	• Board members will not have done any preparation for this, so they will need clear, explicit direction from you. • Appearing in person sends a powerful message that the leadership of the chapter is accessible and welcoming. • The longer version provides a chance for participants to *apply* what they learned about the board structure.
New Member Hosts	Assign participants staying for the monthly meeting to a "host" for this particular meeting. • Recruit hosts ahead of time. Their duties for this one meeting only: ○ Sit with their "guest/s" and make sure the "guest/s" meet everyone at the table. ○ Make sure their "guest/s" understand what is going on at each part of the meeting, and encourage them to ask questions. • Hosts should arrive during the last 10 minutes of the Orientation session. • Have hosts line up at the front of the space. • After your strong close and as participants finish posting any remaining evaluation feedback and gathering their things, have them come to the front. Introduce each one as they arrive to	• This is intended to help new members form additional relationships quickly and demonstrate that we are a welcoming, hospitable chapter. • Being a new member host is also a really easy volunteer role – low-hanging fruit that gets new volunteers in the "pipeline," making it easier for them to volunteer for something bigger next time. (Yes, we're crafty that way.) ☺

	whichever host happens to be next in line, and send the newly matched duo or trio off to the dining room. • Most likely you will need to assign two Orientation participants to each host. You can adjust ratios as necessary.	

Facilitator Feedback

Materials and supplies: Is anything damaged, missing or needing replacement? What changes would you like to request?

Your delivery: Which optional content (if any) did you use? Did you introduce any other variations? What was the impact of your choices? What recommendations do you have for others delivering Member Orientation?

Participant feedback: What themes and highlights arise from the sticky notes?

Other comments: We value any other observations or feedback you share!