**Day One Outline:**
Wikimedia Summit 2019 (Berlin)

**Facilitators:** Dana McCurdy, María Cruz and Simona Ramkisson

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<tr>
<th>Time</th>
<th>Topic</th>
<th>Activity</th>
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</thead>
<tbody>
<tr>
<td>9:00-9:15 AM</td>
<td><strong>Welcome &amp; Introductions</strong></td>
<td>Go-around</td>
</tr>
<tr>
<td>9:15-9:30 AM [15 min]</td>
<td><strong>Safe Space/Friendly Space Agreement</strong></td>
<td>Post and Review Friendly Space Agreement</td>
</tr>
<tr>
<td>10:00-10:45 AM [45 min]</td>
<td><strong>Our Why: why do we want to be trainers?</strong></td>
<td>Purpose Building and Shared Goal</td>
</tr>
<tr>
<td>10:45-12:00 PM [75 min]</td>
<td><strong>What is your leadership style?</strong></td>
<td>Leadership Wheel</td>
</tr>
<tr>
<td>12:00-1:00 PM</td>
<td>Lunch</td>
<td></td>
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<tr>
<td>1:00-1:45 PM  [45 min]</td>
<td><strong>What does it mean to be a trainer to you?</strong></td>
<td>Challenge Zone</td>
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<tr>
<td>2:30-2:45 PM</td>
<td>Coffee/Tea Break</td>
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<tr>
<td>2:00-4:30 PM  [150 min]</td>
<td><strong>Facilitation 101</strong></td>
<td>The Art of Facilitation</td>
</tr>
<tr>
<td>4:45-5:00 PM</td>
<td><strong>Debrief/Closing</strong></td>
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**Welcome and Introduction:**
Facilitators:

**Objective:**
- Facilitators will introduce themselves and collaboratively discuss the outcomes of the day

**Materials:**
- Name tags
- Markers
- Notebooks
- Pens

**Time:** 15 minutes
**Setup:**

1. If room is set up with tables and chairs, place notebook and pen at each seat.

2. Have name tag and markers at registration desk or designate space for participants to create name-tags.

3. Ensure that chart paper with complete agenda for Day 1 is up front and ready to be used for welcome.

4. Project the link to the pre-training survey.

   https://wikimedia.qualtrics.com/jfe/form/SV_eE6cwl5Igonb2Qd

**In-session:**

1. Welcome participants into the space and encourage them to create a name tag with the following information:
   - Name
   - Preferred Gender Pronoun
   - Where are they from or where do they call home

2. Ask participants to fill out the pre-training survey while they wait for us to begin.

3. Facilitators will introduce themselves and their role(s) with the Foundation community and thank the group for attending.

   One facilitator will outline agenda and objectives of the day and ask participants if they need any clarity, accommodations or support to participate in the training.

**Objectives:**

- To increase participants' capacity for structured, reflective, and effective
training of learners.
- To improve participants' understanding of and confidence in their own role and style as a trainer.
- To create a global network of trainers who share knowledge and best practices

**Safe Space/Friendly Space Agreement:**
Facilitators:

<table>
<thead>
<tr>
<th>Objective:</th>
<th>● Introduce participants to the friendly space policy and provide an opportunity for the group to add anything they feel is missing</th>
</tr>
</thead>
</table>
| Materials: | ● Chart paper  
● Markers |
| Time: | 15 minutes |

**Facilitation Instructions:**

**Setup:**

1. On chart paper, have the WMF-event friendly space policy pre-written on chart paper in short bullet form:
   - The Wikimedia community is dedicated to providing a welcoming experience for everyone, regardless of gender, sexual orientation, gender identity or expression, disability, appearance, race, religion, or preferred free license (and not limited to those aspects).
   - We do not tolerate harassment of conference participants. Participants violating these rules may be asked to leave the event at the discretion of the event organizers.

2. Include one blank chart paper which will be used to document any additions from the group.

**In-session:**

1. One facilitator will read aloud the WMF-event friendly space policy. Once finished, the group can add anything they think is missing:

**Discussion prompt:**
- Is there anything that is missing that you need to see up here to feel comfortable to engage in this space?
- Do you need clarity on anything that is stated in the policy?

Any additions can be written down on the blank piece of chart paper.

Remind the group that this policy is to encourage everyone to feel safe, comfortable and open to participate in the space over the course of the training.

3. If not already addressed, one facilitator can introduce **Pause vs. Pass** and **Step Up/Step Back**:

**Pause vs. Pass:** Everyone has a right to pass in this space. If you are in the situation where you are asked to speak and you do not feel comfortable then you can pass or skip your turn. However, we ask that instead of passing on your turn, pause instead. A pause signals to the facilitator that you may need a moment to collect your thoughts and that they should circle back to you for your input.

**Step Up/Step Back:** If you find yourself dominating conversations or speaking over others then we ask that you take a moment every so often to step back and give others the opportunity to contribute. On the flip side, if you find yourself not speaking up but have something to say, take a moment to step up.

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**Our Why: why do we want to be trainers?**

Facilitators:

<table>
<thead>
<tr>
<th>Objective:</th>
<th>● Participants will share why they want to be better trainers and what they hope to leave the training with and apply back in their own communities</th>
</tr>
</thead>
</table>
| Materials:| ● Markers  
● Post-it Notes  
● Pens  
● Chart paper |
| Time: | 45 minutes (includes debrief) |

**Setup:**

1. One two pieces of chart paper, write PURPOSE and GOALS and have them ready at the front of the room.

2. Distribute Post-It notes around each set of tables.

**In-session:**
1. One facilitator will read a quote about purpose from angel Kyodo williams:

**Quote:**

“Every single one of us has a sacred purpose in life by the mere fact of our being born. From the time we come out of the womb until the time we leave this planet our journey is to simply be present to every moment of our lives as it unfolds”

**Discussion Prompts:**
- What do you think this quote mean?
- What does “sacred purpose mean to you?
- Why is understanding your purpose important in general?
- What does purpose have to do with being a good trainer or facilitator?

2. Facilitators will give the group **10 minutes** to think about and write their answer to the following question on a Post-It:

   **My purpose as a trainer is:**

The facilitator will signal when time is up and ask the group to stand up and place their purpose statements on the chart paper titled, **PURPOSE.** If there’s anybody who would like to share their purpose, ask that they hold on to their post-it note.

Facilitators will provide 5-10 minutes for volunteers to share their purpose and read a select few from the **PURPOSE** chart paper.

Before moving into the Shared Goals conversation, outline a few ways in which it is important to know why you want to train and lead others.

3. One facilitator will lead a short conversation about what participants want to leave the training with and take back to their communities.

**Discussion Prompt:**
- We now know **WHY** you want to be trainer but what do you want to leave this training with and bring back to your communities, your work etc?

Designate one facilitator to be a note taker and capture what participants say on **GOALS** chart paper. Once participants have contributed to the list, one facilitator will read the list back to the group and ask if there is anything missing.

The facilitator will close the conversation by outlining the importance of understanding why we have all chosen to attend this training and what we hope to learn and take back to our communities.
What is your Leadership Style?
Facilitators: María leads session.

<table>
<thead>
<tr>
<th>Objective:</th>
<th>Participants will learn about individual leadership styles and how to engage with others of different styles than their own</th>
</tr>
</thead>
<tbody>
<tr>
<td>Materials:</td>
<td>Print out of leadership style descriptions</td>
</tr>
<tr>
<td>Time:</td>
<td>75 minutes (includes debrief)</td>
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</tbody>
</table>

**Setup:**

1. Create four signs on printer paper: **NORTH, WEST, EAST, SOUTH** and post the signs around the room, North and South will be opposite of each other and East and West will be opposite of each other.

**In-session:**

1. One facilitator will open the activity with a discussion prompt about:

**Discussion Prompt:**

- Who has led a training or facilitated a learning experience before in their own communities?
- What was that experience like for you?
- What did you find motivating about this experience?
- What did you find challenging about this experience?

The facilitator/trainer will outline that when leading a training, you have to understand that people have different personality and leadership traits and styles. This activity will help you determine your leadership style and how to better work with different types of people.

2. The facilitator will read out the following instructions:

- Listen to the following descriptions
- Once I am done, move to the direction that best describes your leadership style
- Wait for more instructions once you are in your leadership groups

The facilitator will read each type in order, when things go right and under stress. Remind participants to listen and thinking about themselves in those situations.
<table>
<thead>
<tr>
<th>Type</th>
<th>When things go right:</th>
<th>Under stress, uncomfortable</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>North</strong></td>
<td>You like to get things done. You are known as someone who has courage and endurance. You enjoy new ideas and challenges, and you will easily take risks. You are in your element when you are in charge--when you can map out plans, and have others carry them out. You are very persuasive and can motivate others with your energy.</td>
<td>You want things done your way and you want them done now. You have difficulty delegating because you don't think anyone can do it as well as you. You get impatient when the task is not getting done, and in your impatience, you can bulldoze over others. You will fight for your rights and try to get your way, often getting into a &quot;win, lose&quot; battle, while being unwilling to see another perspective. Others may see you as too strong and reactive.</td>
</tr>
<tr>
<td><strong>South</strong></td>
<td>You are known as a collaborator and team player, and you are at your best when giving support to others. You are known as a warm and friendly person. You are very loyal to your friends and dedicated in your work. You are trusting of others, and you are concerned with fairness, how people feel, and how things are done.</td>
<td>You are too worried about what everyone thinks. You can be too trusting, give in too quickly, and take on too much in order to be seen as a good person. You will assume the blame for something even if you weren't responsible, especially if it means there will be no conflict. You are a &quot;rescuer&quot;--saving people even when they don't want to be saved. Others may see you as a pushover.</td>
</tr>
<tr>
<td><strong>West</strong></td>
<td>You are creative, innovative and intuitive. You are a divergent thinker, seeking new connections, and easily bringing ideas or thoughts together to arrive at the big picture. You are driven by your vision--you know what you want, and optimistically go after it, even if it means changing. Your social skills are excellent, and you freely share your feelings with others.</td>
<td>You think that your vision will carry you through, and that you need not be bothered with the small stuff--the result is that things often fall between the cracks. You are not good on detail and follow through isn't your strong suit. You may appear impractical and disorganized and you can become overly emotional, even melodramatic. You change your opinion frequently. Others may see you as “flaky”.</td>
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</table>
East

You are very analytical and you base your analysis on facts and logic—you are careful, methodical, and deeply introspective. For you to accept a plan or a new idea, it must have a practical payoff. You are pragmatic in dealing with others. You like to look at all angles of a problem before taking action, and you will always have a "fail safe." You are seen as solid, and not easily ruffled.

You can be too critical of others and their work. You analyze problems too much, and thus may find it difficult to move to a decision. You often provide too much data, and once you present your position, you may become stubborn and unwilling to move. You often stick to a traditional view rather than accepting a new way, which may be more effective. You don't express your feelings well, and your lack of expression may make you appear cold and indifferent.

3. Once participants have moved into their new groups, the facilitator will ask a few questions and then more in-depth description of each leadership style:

**NORTH: sometimes referred to as the warrior leadership style**

**Strengths:**
- Assertive, active, decisive
- Likes to be in control of relationship and steer course of events
- Quick to act, expresses sense of urgency for others to act now
- Thinks in terms of "bottom line"
- Enjoys challenge of difficult situations and people
- Likes quick pace and fast track
- Courageous
- Perseveres, not stopped by hearing “NO” probes and presses to get at hidden resistance's
- Likes variety, in the work that they do, looks forward to new projects
- Likes to be in position of leadership
- Value words, phrases: "Do it now!" “I'll do it!” “What's the bottom line?”
- They ask questions such as what's stopping us?” “who's in charge here?”

**Challenges:**
- Gets defensive quickly, argues, tries to out-expert you, sometimes based on few facts
- Loses patience; may push for decision before it's time
- Sees things in terms of black or white, has little tolerance for ambiguity
- May go beyond limits, gets impulsive and disregards practical issues
- Not heedful of other's feelings, may be perceived as cold
- Has trouble relinquishing control -- finds it hard to delegate
- May get overly autocratic, you want things your way, the objective or goal of the project is more important than the people in the decision-making process
How to work with a Nurturer:

- Remember “process”; Attention to what is happening in the relationship feelings between you right now, is of primary importance
- Needs to feel decisions are ethically right; justify decisions around values, ethics, the right thing to do
- Appeal to relationship between you and this person, this person and others
- Listen hard and allow the expression of feeling and intuition in logical arguments
- Easily steam-rolled, be aware this person may have a hard time saying “NO” to you

South: sometimes referred to as the Nurturer leadership style

Strengths:

- Willingness to trust others' statements at face value
- Allows others to feel important in determining the direction of what's happening.
- Value-driven regarding all aspects of personal/professional life
- Uses relationships to accomplish tasks; interaction is primary
- Team-player: receptive to others ideas, builds on ideas of others, noncompetitive
- Able to focus on present moment
- Feeling-based, emotions & intuition regarded as “truth”
- Value words: “right, fair”

Challenges:

- Has trouble saying “NO” to requests
- Internalizes difficulty and internalizes blame
- Prone to disappointment when relationship is seen as secondary to task
- Immersed in NOW; may not see long-term view
- Difficulty confronting, difficulty dealing with anger; may be manipulated by anger

How to work with a Nurturer:

- Present your case quickly, clearly, and with enthusiastic confidence
- Let them know how they will be involved— their payoff
- Provide plenty of autonomy
- When establishing timelines, stick with them
- Give positive public recognition
- Use them in tasks requiring motivation, persuasion, initiative

WEST: sometimes referred to as the Visionary leadership style

Strengths:
• Visionary who sees the big picture
• Very idea-oriented, with focus on future thought
• Insight into mission and purpose
• Strong spiritual awareness-- attuned to “higher level”
• Likes to experiment & explore
• Appreciates a lot of information
• Value words: “option, possibility”

Challenges:
• Has the potential to lose focus on tasks
• Poor follow-through on projects
• Can develop a reputation for lack of dependability
• Can become easily overwhelmed
• Not time-bound, may lose track of time
• Tends to be highly enthusiastic early on, then burn out over the long haul

How to work with a Critical Thinker:
• Allow plenty of time for decision-making
• Provide data -- objective facts & figures person can trust
• Don't be put off by critical “NO” statements
• Minimize expression of emotions, use logic when possible
• Appeal to tradition, sense of history, correct procedures

EAST: sometimes referred to as the Critical Thinker leadership style

Strengths:
• Weighs all sides of issues
• Uses data analysis and logic to make decisions
• Seen as a practical and thorough individual in task situations
• Careful; thoroughly examines people's needs in situation
• Introspective, self-analytical
• Helpful to others by providing planning and resources
• Moves methodically and follows procedures
• Works well with existing resources -- gets the most out of what has been in the past
• Skilled at finding fatal flaws in an idea or project
• “Objective” is a value-word

Challenges:
• Can become stubborn and entrenched in the process vs. the objective/goal
• Can be indecisive, collect unnecessary data, mired in details, “analysis paralysis”
• Tendency towards watchfulness
• Can remain withdrawn, distanced
• Resists change and emotional pleas
• May appear cold

How to work with a Visionary:
• Show appreciation and enthusiasm for ideas
• Listen and be patient during idea-generation
• Avoid critical judging statements of ideas
• Allow and support divergent thinking
• Provide variety in tasks
• Provide help and supervision checkpoints on details and project follow-through

Give the group about 5 minutes:

Please make two statements that will help those with other styles understand you better. (Your statement should explain something that is not evident on the surface.)

Examples:
• “Something most people don’t know about me is...
• “One thing I need from other people is...”

Potential Debrief Questions:
(In leadership groups):
• Why did you select this group, what qualities do you have that made you choose this group?
• How does this style reward or benefit you? Advantages? Perks? What kind of things can you get away with being this style?
• What are the “costs,” challenges or disadvantages for you because of this style? How does it challenge you personally? How might your style challenge or frustrate others?
• What key insights do you now have about your style that you did not have before?
• What will you consider doing differently because of your new perspectives?

(With whole group):
• Why did we do this activity?
• What does this have to do with how you will lead trainings or work in your community?

Challenge Zone:
Facilitators: DANA
**Objective:**

- Participants will learn about their comfort zones as a trainer and have a better understanding of challenge by choice opportunities and develop conceptions of personal strength.

**Materials:**

- Masking tape to create 3 “zones” in the room
- Chart paper
- Markers:

**Time:**

45 minutes (includes debrief)

**Setup:**

1. In the following order, using masking tape identify 3 zones in the middle of the room:

Left: Comfort Zone  
Middle: Challenge Zone  
Right: Panic Zone

**In-session:**

1. A facilitator will ask the group to stand up, and outline the activity. The facilitator will read out a series of prompts, after you have heard the prompt, move to the appropriate zone that best describes your feelings:

   - If you are comfortable with the activity, move to the left. This zone is called your **COMFORT ZONE.** In this zone, you feel very comfortable, at ease, relaxed and confident.

   - If you find the prompt challenging but something you still could do, move to the middle. This zone is called your **CHALLENGE ZONE.** In this zone, you have to push yourself a little further but in the process develop personal strength.

   - If you find the prompt terrifying, then move to the right zone. This zone is called your **PANIC ZONE.** In this zone, you are too uncomfortable to act or engage.

2. After each prompt, give the group a few seconds to think and move to the zone that best describes their feeling. You can debrief in the moment but don’t do it after every prompt i.e *if you are in the challenge zone, what about this prompt is challenging? Why is it scary but not scary-enough not to go through with it?* Or ask
a zone why they chose this zone i.e those in the panic zone, what about this activity is scary that you don’t want to do it?

**Prompts:** the prompts will move from general to trainer-specific situations

- Eating something you’ve never tried before
- Eating alone at a busy restaurant
- Travelling alone or travelling to a country you have never been
- Eating a chocolate-covered grasshopper or insect
- Attend an event where you don’t know anyone or understand the content area
- Singing in public in front of people you know, in front of people you don’t know
- Public speaking in front of a group of 30 people,
- In front of a group of 300 people,
- In front of a group of 30,000 people of people you know, in front of a group of strangers
- Telling a stranger to stop speaking loudly on their cell phone in public
- Giving feedback to your partner, best friend or family member when they do something problematic or when they upset you
- Giving feedback to a stranger that you do not know when they are doing something problematic or when they upset you
- Leading a workshop on a subject you know a lot about
- Leading a workshop on a subject you know nothing about

**Potential Debrief Questions:**

- Why do you think we did this activity?
- Why is it important to think about our own personal challenge zones?
- What happens when we stay in the panic zone or comfort zone?
- How does this apply to leading trainings or events in your communities?

The facilitator can wrap up the module with a statement: In order to do anything to the best of our ability or even living life to the fullest, we need to spend as much time as possible in our challenge zone. If we don’t challenge ourselves, we do not learn new things, experience new things or expand on things we don’t know. Share quote, “Lean into the tension, that’s where change happens.”

**Facilitation 101**
Facilitator: SIMONA (WHAT IS FACILITATION?), DANA (ADULT LEARNING), MARIA (DESIGNING A WORKSHOP)

| Objective: | Walk participants through basic facilitation and training |
concepts and encourage participants to think about how to apply these concepts when facilitating their own programs and workshops in their communities.

**Materials:**
- Pens
- Notebooks
- Chart paper
- Markers

**Time:** 150 minutes (includes break and debrief)

This activity is broken into 7 sections: 1) what is facilitation/training, 2) how adults learn, 3) designing a workshop, 4) public speaking, 5) active listening, 6) how to give feedback and 7) the art of debriefing.

In this session we will be covering:
- What is facilitation/training?
- How adults learn
- Designing a workshop

**Activity One: What is Training/Facilitation:**
**[45 min]**

This activity will focus on providing an overview of what training and facilitation is and how strengthening these skill sets can improve how they lead workshops, design programs and lead events in their communities.

The facilitator will lead a conversation about what a good and in-effective training can look like and how they can become better trainers by developing and strengthening facilitation skills.

**Pre-Set Up:**
1. Have chart paper and markers ready at the front. One sheet of chart paper will be labelled “Good Training” and another sheet of chart paper will be labelled, “Ineffective Training”.
2. Presentation should be pre-loaded on laptop and projector.

**In-session:**
1. One facilitator will lead a discussion about what the training experiences have been like in the group. One facilitator should be taking notes on chart paper.

**Discussion Prompts:**
- With a show of hands, who has gone to a great training before where they left excited about the content?
  - What did that feel like?
  - What about it made it a great training for you?
  - How did the trainer enhance the training session for you?
- On the flipside, who has gone to a training that they found in-effective?
  - What did that feel like and look like?
  - What about it made it in-effective?
  - Did the trainer impact the training?

This activity will move into a presentation that introduces the group to facilitation and how it plays a part in training.

**Presentation: What is Facilitation and Training**
- What is facilitation?
- Facilitation, Training, Teaching
- The role of the facilitator/trainer
- What skills a good trainer needs to be effective
- Top 10 blunders of facilitation
- Introduce the group to their in-session project:
  - Each participant will design a workshop for their community and share their idea in a short 3-5 minute presentation tomorrow
  - The group will provide feedback after the presentation
  - On Day 2, you will get an envelope that outlines who your audience is and a challenge that is present in your workshop

**Activity 2: How We Learn**

**DANA**

[45 min]

**Set Up:**

1. On chart paper, have the following image copied:
The focus of this exercise is to introduce the group to how adults learn. This is a tool that they can use when designing their own programs, workshops, or leading their own trainings in their community.

There is no one adult learning theory. There are several prevalent theories that all explain— from different perspectives— how adults learn. The 3 biggest things to consider are that adults learn best when you can tap into their prior experience, when they feel motivated to learn, and when you can create a learning experience for them. A facilitator will walk through Kolb’s experiential adult learning example as one of the most prevalent models. The focus of this conversation is to encourage participants to see the connection between how adults learn and how they design their own workshops/presentations/etc.

**Kolb’s Experiential Adult Learning Cycle**

- **Experience**: Adults learn best when they can experience something. The goal is to have learners feel something in response to the new materials. This can include engaging in a physical simulation or invoking an emotional response for learners.

- **Reflect**: Adults need time to reflect on their experience to gain insights and acquire knowledge.
**Conceptualize:** Then, adults need time to decode abstract concepts and generalize ideas in a way that relates to their own lives and prior experiences.

**Apply:** Finally, adult learners need to apply their learning in a hands-on activity where that can practice or “learn by doing.” Typically this includes applying learning in a new context or creating a plan for application.

**Discussion Prompt:**
- What about this theory sounds right to you? What do you find challenging?
- Have you followed a similar cycle when learning something new?
- What does this model have to do with being an effective trainer?
- What step do we traditionally focus on when learning?

Apply the model to an example and encourage participants to contribute.

**Example:** learning a new language

**Experience:** Immersion by watching a film in the new language or traveling to a new country

**Reflect:** What was it like to try to speak in a new language? Did you understand any of the words right away? What parts were hardest to understand? How did that experience make you feel?

**Conceptualize:** Read a book or take a class that explains the grammatical rules of the new language

**Apply:** Set goals for learning the new language and practice with others who are learning

**Activity:**
- Break the room into 4 small groups
- Assign each group a step in the adult learning cycle
- Give each group 10 minutes to brainstorm ideas for how they would design an activity for a workshop called “Editing Wikipedia 101.”
  - **Experience:** How will workshop participants first experience or engage in editing Wikipedia?
  - **Reflect:** How will workshop participants reflect on the experience of editing Wikipedia?
  - **Conceptualize:** How will workshop participants conceptualize or think about how to edit Wikipedia?
  - **Apply:** How will workshop participants test out their new skills in editing Wikipedia?
- Ask one representative from each group to share their idea
- Debrief:
○ What was it like to come up with those ideas?
○ Is this model useful?
○ How will they use this model as trainers in the future?

Designing your Training:
https://docs.google.com/presentation/d/1zNRGC6JgrJt8PT1HWzmdUNaSRmGP6ykZjCNkUwGkly/edit#slide=id.g15i05b408d_0.287