Opportunity Management Facilitator's Guide

I.   Purpose of the Facilitator's Guide

The Facilitator's Guide is designed to assist you to deliver a one-day Opportunity Management workshop. The guide is accompanied by a Participant's Guide that is provided to participants at the beginning of the session.

The guide is supplemented by PowerPoint slides which can be used to progress through the workshop. The material in the slides, which can also be recorded on flipcharts if you are not using PowerPoint, can be modified to meet the requirements of your participants.

The workshop exercises are provided to encourage group discussion and interaction and depending on your participants the time can be modified.

Notes to facilitators are contained in the exercises and throughout the guide marked with a bullet ►.

II.   Facilitating the Workshop

The Opportunity Management module may be used for several purposes and groups. First of all, it may be used as a training session so that participants, such as economic development staff, can get involved in a regional or local project to identify opportunities for economic development in their area. Secondly, it may also be used to guide participants through a local or regional opportunity management process designed to identify business and community development projects.

Whatever the purpose of the workshop – as training or to engage in an opportunity management exercise – you will work with the group to determine the content and exercises to reflect the group's needs.

Note: Depending on the audience and/or purpose of the workshop, preliminary reading or research on provincial, regional and local demographics, strategic plans and other information, may be required for some of the activities. The extent and type of preparation should be decided upon as part of the pre-session planning (discussed below).

A suggested, required or additional reading list is attached as Appendix A.

a.   Facilitator Profile

Effective facilitation of this workshop will require you to have the following:

- Skills in group facilitation
- Knowledge of adult education principles
- Understanding of regional economic development boards, municipal and other levels of government
- Understanding of community economic development
- Knowledge of venture and business development

b.   Target Audience

The workshop is designed for the following target audience:

- Economic Development Organizations
- Regional Economic Development Boards
- Regional Development Associations
- Community Business Development Corporations
- Chambers of Commerce or business associations
- Municipalities
- Voluntary Sector
- Economic Development Officers
- Small Business Counsellors
- Entrepreneurs
- Labour Market Analyst
- Researchers
- Community Stakeholders

c.   Participant Profile

Participants of this workshop will be a diverse group of individuals who may come from a variety of backgrounds and represent a variety of groups or organizations. They will bring to the group a wide range of attributes, knowledge, skills and experiences.   Some may be very familiar with community economic development, venture development and opportunity management, while some may be new to these areas. It will be important for you to learn as much as possible about the group so that you can meet their needs during the session.

d.   Pre-Session Planning

The key to a successful workshop or session is careful planning. Once the decision is made to hold the workshop or session, a facilitator can begin the planning.

You should try to identify the specific learning needs of each group in order to customize the structure and content of the workshop so that it will respond to the participants' needs. Types of information and questions that will assist you in designing each workshop include but may not be limited to:

- Individual information (i.e. their name, where they work and/or volunteer, relevant reporting relationships with others who may be attending, the composition of their work/volunteer group, special needs etc.)
- Past community development experience
- Knowledge of past, present and/or future community development initiatives which they were/are/ may be involved
- Experience in identifying opportunities and developing action plans
- Background information on vision, mission, goals and activities of their community development efforts
- A list of priority expectations

You can obtain this information in a variety of ways, such as:

- Arrange a meeting with a representative of the participant group ahead of time. This is usually the most effective and efficient way to obtain information.

- Develop a "pre-workshop questionnaire" which provides participants with an opportunity to identify their specific interests and expectations. A sample questionnaire is provided in the Facilitator's Tool Kit (Appendix B)

- Develop a draft outline of your planned approach to the workshop and send it to the participants via fax, e-mail or snail mail. Ask them to provide feedback on the agenda and the learning objectives. A sample letter is provided in the Facilitator's Toolkit. You may consider incorporating additional information in this correspondence which you will need to send out to the participants.

e.   Developing Workshop Agenda

Once you have completed the pre-session planning, the workshop or session agenda can be developed. The suggested agenda and time lines suggested are for guidance only as the exercises may take less or more time. You can adjust according to the requirements of the session. The key is to facilitate a process of empowering and assisting participants to achieve established objectives.

While the method for each activity is prescribed, it is recommended that the facilitator determine the best approach for each activity.

Depending on the size of the workshop, small groups should consist of 4-7 participants. Switching the membership of the small groups provides individuals with the opportunity to hear fresh perspectives and to create the opportunity for participants to expand their network.

Activities to support the various topics are contained in the facilitator and participant guide. The activities or exercises have the following:

- Suggested time lines
- Objectives
- Advance preparation
- Exercise
- Notes to facilitator
- Facilitator resources
- Participant resources

The needs and interests of the participants and the time available will determine the topics that will be explored in the workshop. You will develop your workshop agenda based on your pre-session planning (questionnaire, interviews, and meetings) but the agenda should include the following:

- Objective of the session
- An introduction
- Establishing ground rules
- A review of the key learning objectives
- Topic overviews and activities
- Assessment and discussion of issues, concerns and challenges
- A conclusion consisting of a review of expectations and completion of the workshop evaluation

Note: A workshop agenda is included in the facilitator and participant guide and can be used as a guide to customize the workshop agenda.

f.   Materials/Supplies/Equipment

The following supplies will be required:

☐   flip chart stand(s) and paper
☐   markers, pens and pencils
☐   masking tape
☐   paper for participants
☐   Post-it notes or stickers for exercises
☐   copies of any handouts to be used
☐   folders and/or small binders for participant's tools

If you opt to use an overhead projector and laptop then you will need the following:

☐ Overhead projector
☐ Extra bulb for the projector
☐ Laptop
☐ Extension Cords
☐ Copies of overheads for participants
☐ Screen
☐ Power Bar
☐ Discs

Caution: Always develop a Plan B when using technology!

g.   Logistics

The workshop space should be comfortable as you will be spending a full day in the room. The lighting, seating, temperature, location of washrooms, availability of water or coffee, all contribute to the success of your session. Participants should be advised in advance if food will be provided during nutritional breaks or lunch. Ensure that you accommodate any special needs of your participants.

If you are not familiar with the allocated workshop space, arrange to visit it prior to the session or discuss your requirements with a representative of the organization or the facility you will be using.

This workshop has been designed to accommodate 12 to 16 participants. You will need a large room that will accommodate a U-shaped seating arrangement which will encourage group participation. To support the small group discussions which will be taking place, break out rooms/sufficient space will be needed.

h.   Housekeeping

At the beginning of the session, it is important that you address all "housekeeping" type items. These may include but are not limited to:

➤ Advise participants if they will receive handouts
➤ Length of workshop
➤ Nutrition and lunch break times
➤ Location of the water cooler, kettle, coffee pot, washrooms, available telephone etc.
➤ Use of cell phones
➤ How messages will be handled
➤ Contact number
➤ Emergency exit

➢ Other

i. Guidelines

Advise participants that you will be using a **Parking Lot** tool which is a space for questions, comments and issues that arise during the session that are not covered in the agenda or require additional material. The parking lot will be addressed at the end of the session.

Another facilitation technique that some find useful is to assign a **Timekeeper** so that the agreed upon time lines in the agenda are followed by the facilitator. The timekeeper is responsible for advising the group when the allocated time for a topic is up. Using a timekeeper allows the group to take a collective responsibility for the effective use of time throughout the session.

Establishing **Ground Rules** is a useful strategy to get the group to identify actions and behaviours that are to be followed during the session. For instance, a common Ground rule is that the group sticks to allocated times unless everyone agrees; that you address the issue and not the person; one person speaks at a time; no interruption, etc. The group decisions on ground rules provide a positive environment for the facilitator and the participants who have contributed to the rules for the session.

III. Post-session Work

The post-session work involves addressing any issues that arise from the parking lot or arranging for some follow up to address any issues. The participants are responsible for evaluating the workshop and the facilitator so an evaluation form is to be provided for each participant. A member of the group should collect the completed forms and provide them to the organization and they will then be later forwarded to the facilitator.

The facilitator should also prepare a list of lessons learned throughout the session – what worked, what needs improvement, what could change – recognizing of course that the participants and their expectations may change with the next session.

Table of Contents

Agenda*

Activity	*Time
Ice Breaker	15 minutes
Welcome and Introductions	10 minutes
Agenda Review/Logistics	10 minutes
Workshop Objectives	5 minutes
What is Opportunity Management?	30 minutes
Provincial, Regional and Community Profile	60 minutes
Identify Opportunities	45 minutes
Management Criteria	60 minutes
Action Planning	60 minutes
Parking Lot	15 minutes
Discussion/Summary	15 minutes
Evaluation	10 minutes

*Agenda and timelines for suggestion only.

1.0   Introduction to Workshop

➢ **Welcome and Introduction**

Welcome participants and tell them a little bit about yourself. Introduce the workshop topic, the sponsoring agency, and broad objectives for the day.

Explain whether the session is designed to provide an overview of the opportunity management process or whether the session will be focused on working through the exercise which required extensive pre-session reading from Appendix A.

Refer to the Participant's Guide which they can follow throughout the session, and any additional material that will be used during the day.

Ask participants to introduce themselves and state what they expect from the session, or you can use an icebreaker to get introductions.

➢ **Icebreaker**

Select an icebreaker from the facilitator's guide or one of your own choices that is suitable for your group and its size. You can use the introduction as the icebreaker by having participants tell a little about themselves (more than just their name and organization).

➢ **Agenda Review**

Review with participants the agenda that you have prepared on a flipchart or on a PowerPoint slide. Discuss the following:

- any changes to the content or timelines
- housekeeping" issues such as breaks, lunch, etc
- ground rules
- time keeper
- parking lot
- other

2.0   Workshop Objectives

By the end of the session, participants should be able to:

➢ Understand opportunity management and its role in community economic development
➢ Describe the major steps in the opportunity management process
➢ Understand and apply criteria needed for opportunity management
➢ Develop strategies to engage in opportunity management in your community or region
➢ Identify stakeholders to be involved in the process
➢ Determine the partners to be involved in feasibility studies and action planning

Opportunity Management   **Exercise #1**

Time   15 minutes

Objective

Introduce participants to opportunity management

Advance preparation

Draw the Venture Development Funnel and post it so that it can be referred to during the session.

Exercise

Brainstorm ideas of what constitutes opportunity management.

Note to facilitator

Prepare flipchart sheet for answers and then refer to them as you proceed to the introduction and review of opportunity management.

Some participants may have been involved in an opportunity management project so this should be acknowledged.

Facilitator resources

Flipchart

Participant resources

None

3.0   What is Opportunity Management?

➢ **Complete Exercise #1**

➢ **Review Exercise #1**

➢ **Discuss material below**

The Opportunity Management workshop is designed to introduce community stakeholders to a process to identify business and community development opportunities that could be implemented to sustain or improve the local economy. The module can be used for a one-day session or can be used as a basis for a more comprehensive process. Regardless of the magnitude of the opportunity management project, the workshop will guide you through the required steps.

First of all it is important to put opportunity management into perspective. Opportunity management is part of the venture development process, which involves indentifying, screening, selecting, planning and implementing opportunities (Westcoast, 1991). Opportunity management is one step in the venture development spectrum as indicated in "the Venture Development Funnel" developed by Westcoast (See Appendix A) and the workshop is adopted from this model.

Opportunity management from an entrepreneur's perspective is a process of perceiving unmet needs and wants and developing a vision and action plan that is profitable for an entrepreneur. Entrepreneurs are regularly scanning the environment for opportunities and seize opportunities for new or expanded business. While entrepreneurs have a sense of opportunities, it is a skill that can be learned, so community stakeholders can learn to be sensitive to needs and wants in your community. Being able to identify opportunities does not mean that you have to pursue the opportunity which will emerge from this session.

So how does an opportunity management process help communities? While opportunity management has been traditionally used in businesses seeking new sources of revenue, the term and the process is now being widely used to describe a series of formal and/or informal activities or processes designed to identify business opportunities in a community or region.

Government is also interested in the opportunity management process as it helps them to provide local solutions to assist regions and communities. A systematic process of identifying opportunities to focus on regional and community priorities assists government, government agencies, funders and other agencies in their decision making process on funding priorities, tax incentives, and other programs for business and community development.

The area of social or community enterprise is now a priority area for government funding so there may be opportunities that are not being explored by the private sector but may be useful for community-based not for profit organizations.

Changing demographics due to an aging population, declining birthrate, declining rural population, industry changes, outmigration and other factors are having an impact on the province's economy. While the province is experiencing unprecedented growth, there are communities and regions that are being negatively impacted by the changing demographics, and this combined with gaps in services and products, resources, facilities and infrastructure, presents opportunities. There are also communities that are experiencing the benefits of the robust economy and need to continue to identify and implement strategies to sustain the growth and development

The workshop is designed to assist regional economic development boards, chambers of commerce, municipalities, regional or community groups, volunteer organizations, and staff of these and other organizations, interested in identifying and pursuing investment opportunity management activities in their region. The workshop may focus on providing groups with information needed for the exercise, or the facilitator can help the participants through the various stages of the opportunity management exercise as part of a more comprehensive venture development workshop series.

The session will examine the importance of understanding the provincial context and compiling a provincial profile. The requirement for a regional and/or community profile will be reviewed and the sources of information for this important aspect. Once the provincial and regional context are in place, the session will cover the idea generation phase and the importance of determining criteria to assess the many opportunities in a region. The session will then explore

how the list of opportunities that emerge from the process can be further refined to determine which ones warrant implementation.

3.1   Provincial Profile
➢ **Discuss**

The first step in the opportunity management process is to have an understanding of the provincial context. The state of the provincial economy and how it impacts or influences the region or community must be understood. The priority areas for provincial government funding, tax and other incentives for community development or business development opportunities must also be considered in the provincial overview.

So what should be reflected in the provincial overview? Below are some of the items for consideration. Information on these areas is available from a variety of provincial publications and websites (see Appendix B).

> ➢ Real Domestic Product
> ➢ Employment/Unemployment
> ➢ Income
> ➢ Retail Sales
> ➢ Housing Starts
> ➢ Capital Investment
> ➢ Outlook for Major Industries
> ➢ Tax Incentives
> ➢ Funding Programs
> ➢ Priority Sectors
> ➢ Research and Development
> ➢ Education
> ➢ Others?

➢ **Complete Exercise #2 and review list plus Appendix B**
➢ **Complete Exercise #3**

Provincial Profile   **Exercise #2**

Time   15 minutes

Objective

Understand the importance of a provincial profile and where to obtain information to compile the profile

Advance preparation

None

Exercise

Brainstorm sources of information to compile a provincial profile and what should be included in a profile.

Note to facilitator

Prepare flipchart sheet with some sources of information and what should be included in a profile.

Facilitator resources

Flipchart, markers

Participant resources

Time   15 minutes

Objective

Identify priority sectors for your region or community from list on following page.

Advance preparation

None

Exercise

Assign groups of 4-7 and rank priorities.
Groups report back on their priorities.

Note to facilitator

This exercise is designed to get participants thinking on a provincial scale and to illustrate how priorities may differ.

Facilitator resources

Flipchart, markers

Participant resources

None

Provincial Sectors   **Exercise #3**

Which of the province's priority sectors (as of December 2007) are suitable in this region?
Rank from 1 to 12 (most relevant to least relevant)

Fisheries   _____
Aquaculture   _____
Manufacturing   _____
Oil and Gas   _____
Energy   _____
Mining   _____
Agrifoods   _____
Forestry   _____
Tourism   _____
International Trade   _____
Information Technology   _____
Major capital Projects   _____

➢ Source: Government of Newfoundland and Labrador (2007). The Economic Review 2007.
   Economic Research and Analysis Division: St. John's, NL

3.2   Regional and Community Profile

The provincial profile will contribute an important provincial perspective to the opportunity management process. Once the provincial profile – demographics, socio-economic information, priority sectors, tax incentives and other relevant information required by the organization - is completed, the next step is to focus on regional and/or community data.

The profile will include information listed below (provincial data may also include some of this data but it is critical to have it at the local level as well).

- Population
- Age distribution
- Out-Migration
- Birth and death rates
- Unemployment/employment rates
- Labour market information
- Income and sources of income
- Other

➢ **Discuss what else should go in the profile.**

The Newfoundland and Labrador Statistics Agency, a branch of the provincial government's Economics and Statistics Branch, Department of Finance, has compiled regional profiles and community profiles. These profiles are also available through the Rural Secretariat website and Community Accounts websites. See Appendix B for information on these websites and other resources.

3.2   Regional and Community Profile
➢ **Discuss Regional Plans and sources of information**

3.2.1   Regional Plans

In addition to the demographic, social and economic information available from the provincial government's website and various publications, regional and community information is collected and analyzed as part of various plans of other organizations. Some of the sources of plans are outlined below.

▪ **Regional Economic Development Boards**

The province's Regional Economic Development Boards are all mandated to develop and coordinate the implementation of a strategic economic plan which is supported by an integrated business plan. These plans provide a regional overview and a strategic plan outlining goals and objectives for a three-year period. There are 20 regional economic development boards throughout Newfoundland and Labrador, each with a volunteer board of directors and staff. Information on their strategic plans is available through their websites (see Appendix B).

▪ **Community Business Development Corporations**

Community business development corporations throughout Newfoundland and Labrador are mandated to provide business counselling and funding for creating, expanding and modernizing small businesses. These organizations have volunteer boards of directors and staff, and also prepared a three-year strategic plan. See Appendix B for contact information.

▪ **Rural Secretariat**

The Rural Secretariat was established by the provincial government in 2004 to promote rural issues. The secretariat is comprised of nine regional councils and one provincial council which provide advice and guidance on rural and regional strategies developed for the province. As part of its mandate, the secretariat has developed detailed, regional profiles for each of the nine regions of the province. The information which is readily available online (see Appendix B) allows government, citizens, community organizations and other users to look at a region and

examine its socio-economic, demographic and municipal status and to determine what infrastructure is available and to help communities and regions identify and take advantage of opportunities for growth.

- **Chamber of Commerce**

There is a network of local chambers of commerce throughout the province and some have prepared regional or community profiles that could assist with the opportunity management process. Chambers are useful sources of information on the types and numbers of businesses in a community and region, so should be consulted about the opportunity management project.

3.2.2   Community Plans

- **Economic Development Plans**

Many municipalities are involved in business prospecting as part of their economic development activities and have prepared comprehensive community profiles. Check the website of your community or visit the province's various websites to get current information on communities.

- **Municipal Plan**

Municipal plans which deal with development priorities and regulations for municipalities also contain relevant community data on housing starts, growth and development patterns and other information that can be reviewed as part of the opportunity management process.

➢ **Discuss any other sources of information**

3.3   Research and Development

➢ **Review and Discuss**

Research and development is a major factor in identifying and pursuing economic opportunities. While research and development facilities exist throughout the province, the types of facilities and their research are often not reflected in provincial, regional or community profiles. While announcements on funding may be regularly made, research and development, due to the nature of the work, is not widely promoted until the findings become relevant or useful.

So how do you know what is happening the research and development field? Any government funded research (through Atlantic Canada Opportunities Agency, Industry Canada, provincial Department of Innovation, Trade and Rural Development, etc) is usually announced through news releases so searching various government news sites will provide information on the research, the funding level, the partners, and other relevant information. .

Memorial University, Marine Institute, College of the North Atlantic, and federal departments and agencies such as the Department of Fisheries and Ocean and the National Research Council are key research facilities so information on activities in these institutions can often be obtained.

Regional economic development boards, community business development corporations, chambers of commerce, or municipalities may be familiar with research and development activities through partnerships as part of their work plan.

➢ **Complete Exercise #4**

Research and Development   **Exercise #4**

Time   15 minutes

Objective

Identify leaders in research and development and any projects or opportunities in your region.

Advance preparation

Review any pre-session reading on research and development activities in the region if applicable.

Exercise

Brainstorm a list of any research and development leaders in your region or community, and how they could enhance a potential project in your area.

Note to facilitator

Prepare flipchart sheet so that the highlights can be recorded.

Depending on time and audience, have a flipchart sheet or PowerPoint slide prepared with a summary of some of the research and development agencies or activities in the region or community.

Select a potential project based on your knowledge of the area if you wish to complete this part of the exercise to demonstrate the relationship between R & D and opportunities.

Facilitator resources

Flipchart

Participant resources

Background material, if applicable

3.4   Community Infrastructure

Regional profiles available from various government sites may not include up to date information on infrastructure that is available in a region or community. Community profiles produced by municipalities often contain some infrastructure details, however, may also not be up-to-date or relevant.

Identifying infrastructure is important in the opportunity management process because it can influence whether or not an opportunity is worth identifying and pursuing. For instance, a community may have land, the labour, and local services for a manufacturing facility but does not have access to water and sewer for the facility.

The following is a list of some basic infrastructure needs:
- Broadband – is the community or region served by high speed internet
- Cell phone coverage – is coverage available from the major cell phone providers
- Community services – water/sewer/garbage collection
- Road network – primary and secondary roads
- Harbours/ports – are there commercial, fishery, and recreational harbours in the community or region
- Buildings – sizes and locations

➢ **Complete exercise #5**

Infrastructure information is critical in site selection industry so the International Economic Development Council (IEDC) has available a set of standard data collection templates. These templates are designed to provide an internationally consistent data on for regional and/or community profiles. These templates, available at the IEDC website, are being used in Newfoundland and Labrador by the Newfoundland and Labrador Statistics Agency of the provincial government (see Appendix B) to compile comprehensive community profiles in the Northeast Avalon region.

The Agency, in partnership with the Town of Conception Bay South and the Capital Coast Development Alliance has launched a project to develop comprehensive community profiles using these internationally accepted templates. The templates can be used to gather information on infrastructure, existing buildings and land, telecommunications, transportation, etc.

Community Infrastructure **Exercise #5**

Time 15 minutes

Objective

Identify the types of infrastructure that should be contained in the regional or community profile.

Advance preparation

Decide upon several business types for exercise (manufacturing facility, golf course, fish plant, call centre, etc)

Exercise

Assign small groups and provide each with a type of business and ask each group to identify the types of infrastructure that would be needed to develop a plan to attract or expand that type of business in the community.

Note to facilitator

Prepare flipchart sheet so that the highlights can be recorded.

Depending on time and audience, have a flipchart sheet or PowerPoint slide prepared with a summary of some of the general types of infrastructure required in a region or community

Facilitator resources

Flipchart

Background material (if available)

Participant resources

3.5 Business and Services

➢ **Discuss**
➢ **Complete Exercise #6**

The provincial overview, regional and community profiles, research and development and infrastructure provide the essential background to proceed to identify opportunities for business and community development in your community or region.

Another important step in preparing to identify opportunities is to review the major employers and economic generators in your region and/or community. The review should consider what already exists and whether it is meeting the market, the number of jobs, potential business expansions or start ups, community leakage, and any gaps that can be filled by new or expanding businesses.

The provincial and local socio-economic data, combined with a synopsis of the local business community, are critical first steps in any opportunity management process. The next section of the workshop will focus on generating ideas and opportunities and then developing criteria for an management of the opportunities. Following an management, a list of potential options for the region or community will emerge for further research and analysis.

Business and Services   **Exercise #6**

Time 15 minutes

Objective

Identify major employers and opportunities in the community or region.

Advance preparation

None

Exercise

Use large group or small groups to complete the exercise on the next page.

Note to facilitator

Prepare flipchart sheet so that the highlights can be recorded.

Depending on time and audience, have a flipchart sheet or PowerPoint slide prepared with a summary of some of the general types of infrastructure required in a region or community

Facilitator resources

Flipchart

Background material (if available)

Participant resources

Business and Services in your Region   **Exercise #6**

Who are the major employers in your region?

_____
_____
_____
_____

What sector(s) s do these employers fall within?

_____
_____
_____

How many people are employed in the region?

_____
_____
_____

How many people leave the region for work or to obtain goods and services?

_____
_____
_____

What are some growth areas in your region?

_____
_____
_____
_____

What are some of the gaps in your community or region?

_____
_____
_____
_____

4.0   Identify Opportunities

The first section of the workshop focused on the background information that is required for the opportunity management process. The information may be compiled in a workshop or series of workshops or sessions with a wide variety of community stakeholders.   The information may also be prepared as a discussion paper or background paper by the regional economic development board, business development corporation, or other group coordinating the opportunity management process.

Once you have a profile of your community, region and province you have an indication of the environment in which you are working. The next step is to analyze the information and region to start identifying gaps, or opportunities that can be researched and then possibly implemented in your region or community.

Communities sometimes become focused on a particular industry or business idea and focus their research around that idea. While the approach may bring some success, considerable time and resources may be spent and other opportunities lost in the process. For instance, a community may feel that it needs a call centre to fill a vacant warehouse, and this may be supported by one or two community leaders. The municipality or business organization may then focus its business prospecting in this area, while other possible sectors are emerging but not given any consideration.

The best approach to ensure that all opportunities are examined is to conduct a systematic review of opportunities before focusing on the research, business plan development, funding proposal and implementation phases.

- ➢ **Complete Exercise 7**
- ➢ **Discuss Exercise 7**

Once the list of opportunities is posted, it should become evident that there is usually an abundance of ideas from the community. The next step is to identify criteria to be used to refine

the list. The criteria will take into account factors such as the regional economy, resources, and whether the opportunities are designed to encourage business development or organizational capacity.

Business Opportunities   **Exercise # 7**

Time   15 minutes

Objective

Get participants thinking about business opportunities.

Advance preparation

Review the Venture Development funnel to illustrate this step in the process.

Exercise

Participants brainstorm the business ideas that they are interested in. Focus the ideas on the community or region that participants come from.

Note to facilitator

Facilitator resources

Flipchart

Participant resources

Opportunities List   **Exercise #8**

Use the space below to generate a list of business ideas or opportunities.

1._____
2._____
3._____
4._____
5._____
6._____
7. _____
8._____
9._____
10._____
11._____
12._____
13._____
14._____
15._____
16._____
17._____
18._____
19._____
20._____

4.1   Management Criteria

The next step is to assess the opportunities generated by the group. Before embarking on analyzing the list of opportunities, the group should define how the opportunities will be assessed.

The management of opportunities often depends on what the group is looking for. Is your organization looking for opportunities for social or community enterprises that will be operated as non-profit businesses employing a target group? Are you a municipality or regional economic development board or agency pursing economic development opportunities for your community or town that will create new businesses, generate jobs and a tax base? The management criteria will focus primarily on how these priorities can be achieved.

The most useful criteria will consider a balance of the various perspectives – community, business and organizational.

Samples of management criteria are contained on the following pages.

➢ **Review management material**
➢ **Complete exercise 8**

Management Criteria

The following is a list of criteria that can be used to evaluate and analyze opportunities. You can use the list, or use it to compile one for your community. You should assign a number from 1 to 100 to represent the importance of each or you can give them equal weight. The total should be 100.

1.   Number of Jobs – how many jobs are being created or will be created?

3.   Quality of Jobs – do the jobs require post-secondary education? Are they full-time permanent jobs? Are they paying adequate salaries?

3.   Environmental impact – what impact will the opportunity have on the local or regional environment? Is the opportunity going to require environmental management?

4.   Business development – will the opportunity result in more business development opportunities in the region? Spinoff businesses create more jobs

5.   Impact on community – will the benefits of the opportunity outweigh the costs?

6.   Financing required – will the opportunity require financing from government or other sources?

7.   Sources of financing – are there available sources of financing or government funding available for the business or project?

8.   Community support – will the community support the opportunity or is the community advocating the opportunity?

9.   Risk – will there be risks with the project and if so, what type?

10. Timing – will the project be implemented in a timely manner so that results are seen in a reasonable timeframe?

11. Infrastructure – does the community or region have the necessary infrastructure to accommodate the business? If there is new infrastructure needed, the project may receive a lower ranking than one that utilizes existing infrastructure.

12. Resources – are there organizational resources to conduct necessary research and to pursue the opportunities that are identified?

Adopted from Northeast Alberta Information Hub Ltd.
Industry Investment Opportunity Management 2003.
By Meyers Norris Penny
Northeast Alberta Information Hub Ltd.

Management Criteria

The National Economic Development and Law Centre's Venture Selection Criteria is another model that can be used as part of the venture development opportunity management process.

Model of Venture Selection Criteria (from Westcoast Development Group, 1991)

Selection Criteria	Employs community members	low start up costs	Located in community	Break even in one year	Non-competitive	Stops leakage of community money	Uses existing organization assets	Use existing organizational expertise	Provides needed community services or products	Total
Day Care										
Bakery										
Employment Skills Centre										
Recycling Centre										
Construction company										
Storm window manufacturing										
Home Care Agency										
Handicraft Distribution Company										

Scoring:

0 = Venture does not meet criterion
5 = Venture does meet the criterion

Model developed by: National Economic Development and Law Centre, 1950 Addison St., Berkeley, California, USA 94704

Management Criteria   **Exercise # 8**

Time   30 minutes

Objective

Identify criteria that reflect the community or region's goals.

Advance preparation

Review the criteria in the participant guide.

Exercise

Divide participants into three groups to develop criteria from the community perspective, business perspective, and organizational perspective.

Each group generates a list of criteria and reports back to the large group.

Note to facilitator

Facilitator resources

Flipchart

Participant resources

4.2 Apply Criteria

Once the criteria have been identified the next step is to undergo a process to rank the opportunities. Several examples are included, and the group may wish to develop a model that is unique to the community or region's needs. The ideas with the highest and lowest rankings will emerge from the process so that the group has the best opportunities to pursue.

The group may wish to go through the management step a second time to further refine the opportunities so that the list is realistic.

When assessing possible ventures the group should remember that the best ones are those that reflect the interests and perspectives of the community, business, and group or agency involved in community enterprises

➢ **Complete exercise 10**
➢ **Review and discuss the opportunities that emerged**

Apply Criteria **Exercise # 9**

Time   15 – 30 minutes

Objective

Apply criteria to opportunities identified in the session.

Advance preparation

Select some of the criteria developed by one of the small groups and select some opportunities to be assessed.

Exercise

Complete the exercise to assess various business opportunities in the region in order to select several for further analysis. Use the chart on page 34.

Note to facilitator

See above about select the criteria and opportunities or if time permits you can select based on group discussion.

Facilitator resources

Flipchart

Participant resources

List of opportunities

Apply Criteria

Use the table below to apply criteria to opportunities identified by the group.

Selection Criteria										
Opportunity 1.										
2.										
3.										
4.										
5.										
6.										
7.										
8.										

Scoring:

0 = Venture does not meet criterion
5 = Venture does meet the criterion

5.0   Action Planning Process

The application of the criteria leads to the management of the best opportunities to explore through further research and analysis. This action planning phase starts with a review of the short list of opportunities to determine whether some can be eliminated (with or without a possibility of being examined at a future time) before closer research and analysis. The number of opportunities identified for the research phase will depend on the number of initial ideas, the priorities identified through the management process, and the resources available to the lead organization to undertake the follow up work.

The closer research and analysis should be completed by the regional economic development board, business development corporation, or other organization involved in the opportunity management project. If there is not a group identified for follow up, the community or regional stakeholders need to find a group or organization to champion the ideas to move them forward.

Once there is a decision on available resources to continue the project, the next step is to develop a plan for the further research, analysis and evaluation which is usually a comprehensive and community-based exercise. The lead organization needs to consider the types of research, and should also consider the type of community process and how it should be organized and implemented.

Another important factor to consider is the time-frame for the project. The group may wish to set some timelines for completion of the project with milestones reported throughout the research phase. The length of time for the priority opportunities to be thoroughly researched will depend on the group's resources, possible funding proposal deadlines, the extent of public consultation, and other factors.

The following outlines some of the research and community consultation methods that are undertaken to refine the opportunities identified in a region.

- Research methods
  - Cluster analysis
  - Literature Review
  - Internet Search
  - Local marketing and business plans
- Public Consultation
  - Community meetings
    - Municipal
    - Chamber of Commerce
    - Regional Economic Development Board
    - Community Business Development Corporation
    - Rural Secretariat
    - Government departments and agencies
  - One on One Meetings
  - Telephone interviews
  - Focus Groups

The research and analysis report can be presented in a variety of formats as long as the key descriptors are included. A suggested format could include:

- Description

- Industry Overview

- Market Overview

- Current Management
  - Regulations
  - Currency
  - Environmental
  - Labour
  - Education and training
  - Innovations
- Success Factors
  - Marketing
  - Infrastructure

- o Labour force
- o Other
- Economic Overview

Each opportunity identified by the group and subject to the follow up research should be described in this or a similar and consistent format to make it easy for the community, funding agencies and other stakeholders to read and understand.   The consistent format will also be easily incorporated into the subsequent business plan and/or funding proposals.

Finally, at this phase of the opportunity management process, a steering or some type of management committee should be established (if not at the beginning of the project) to manage and/or monitor the remainder of the project to ensure that it is completed as planned.   It is important to ensure that the relevant community partners – government, regional economic development boards, funding agencies, community groups, municipalities – are represented in the steering and management committee as well as the entire opportunity management exercise.

Identify Next Steps   **Exercise #10**

Time   15 minutes

Objective

Identify follow up to pursue required research for opportunities identified during the workshop.

Advance preparation

None

Exercise

Participants will brainstorm as a large group a list of next steps to follow once the opportunities list is narrowed down.

Note to facilitator

Facilitator resources

Flipchart

Participant resources

Opportunities Description Template

The template is a guide for describing the opportunities that are selected for further research and analysis.

- Description

- Industry Overview

- Market Overview

- Current Management
    - Regulations
    - Currency
    - Environmental
    - Labour
    - Education and training
    - Innovations
- Success Factors
    - Marketing
    - Infrastructure
    - Labour force
    - Other
- Economic Overview

Please add any other areas that should be included in the description.

6.0   Parking Lot

Review any items that arose during the workshop or planning session.

7.0   Discussion/Summary

Summary of the session, any follow up discussion or action items.
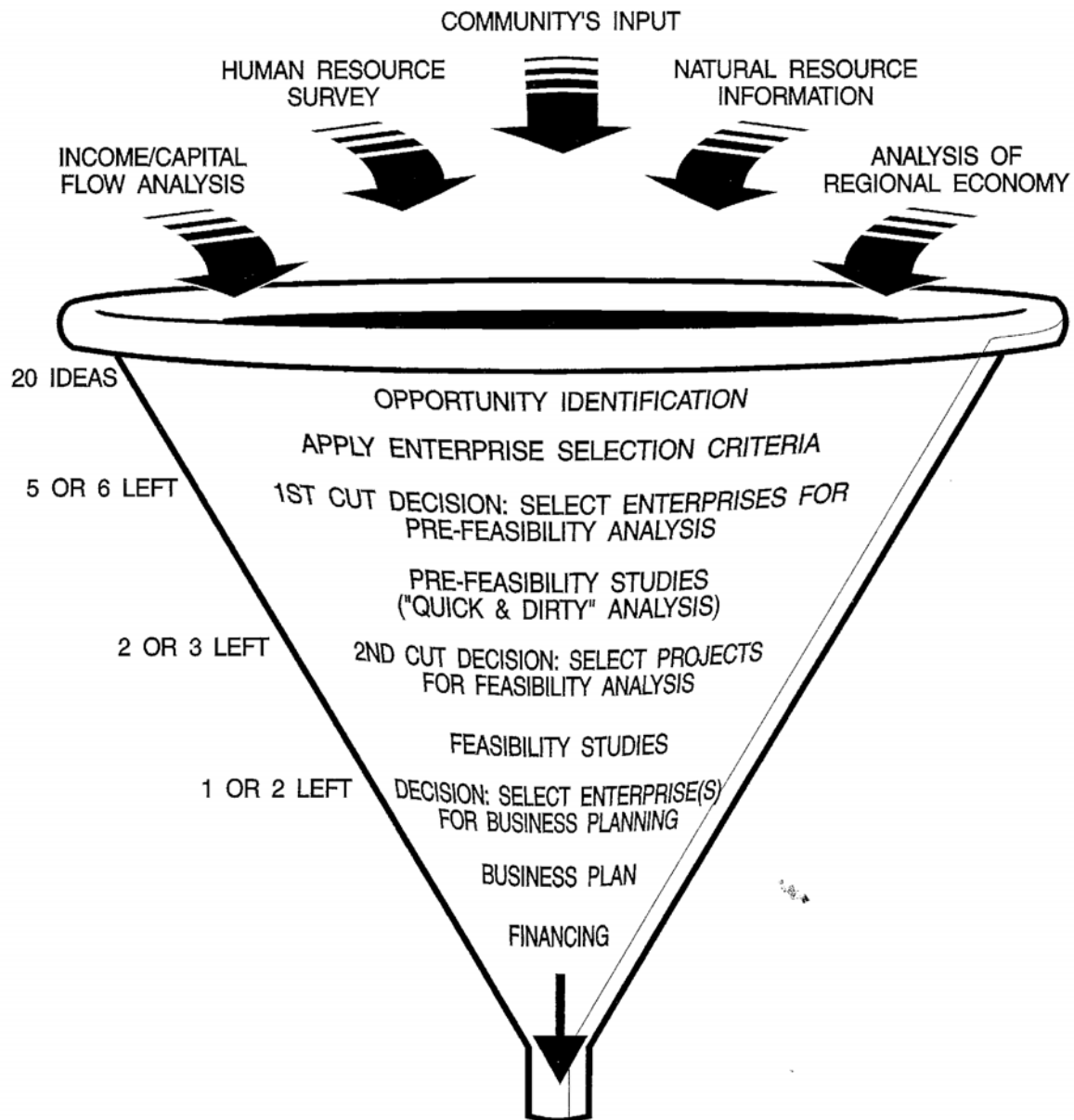
8.0   Evaluation

Participants complete an evaluation on the session. It can be a form or can be done orally with comments recorded on a flipchart.

9.0   Appendix

10.0 References

Notes

Appendix A

The Venture Development "Funnel"

COMMUNITY'S INPUT

HUMAN RESOURCE SURVEY

NATURAL RESOURCE INFORMATION

INCOME/CAPITAL FLOW ANALYSIS

ANALYSIS OF REGIONAL ECONOMY

20 IDEAS

OPPORTUNITY IDENTIFICATION

APPLY ENTERPRISE SELECTION CRITERIA

5 OR 6 LEFT

1ST CUT DECISION: SELECT ENTERPRISES FOR PRE-FEASIBILITY ANALYSIS

PRE-FEASIBILITY STUDIES ("QUICK & DIRTY" ANALYSIS)

2 OR 3 LEFT

2ND CUT DECISION: SELECT PROJECTS FOR FEASIBILITY ANALYSIS

FEASIBILITY STUDIES

1 OR 2 LEFT

DECISION: SELECT ENTERPRISE(S) FOR BUSINESS PLANNING

BUSINESS PLAN

FINANCING

2

Appendix B

Opportunity Management Resources

Government of Newfoundland and Labrador
www.gov.nl.ca

      Economic Review 2007 – available at www.economics.gov.nl.ca
      Regional profiles -
      www.economics.gov.nl.ca/population/regionaldemographicprofiles.asp
      Department of Business – Sector Profiles – www.nlbusiness.ca/aboutnl/sectors.html
      Population projections - www.economics.gov.nl.ca/population/
      Regional and Community Information - www.stats.gov.nl.ca (provides links to regional
      and community information)
      Community profiles - www.communityaccounts.ca
      Newfoundland and Labrador Statistics Agency – www.stats.gov.nl.ca

Regional Economic Development Boards –
www.nlreda.ca
www.intrd.gov.nl.ca/intrd/economicboards.htm

Community Business Development Corporations
www.cbdc.ca

Memorial University
www.mun.ca

College of the North Atlantic
www.cna.nl.ca

Rural Secretariat
www.exec.gov.nl.ca/rural/

International Economic Development Council
Community Profile templates (Excel format)
www.iedconline.org/?p=Data_Standards

Appendix C

Facilitator Tool Kit

1. Tools and Techniques

General

Before starting a facilitated session there should be some form of "contract" or agreement between the facilitator and the group. Many advocate that this should be written but this is not necessary providing there is a clear understanding on the basic issues such as;
- the role of the group
- the role of the facilitator
- the broad aims of the session (note these need to be checked with the group)

For facilitated sessions it is useful to breakdown the traditional barriers that exist between people. To assist with this it is often better to lay chairs out in an informal style that facilitates open discussion.

The main aim of the facilitator must be to remain neutral and ensure that there is the "buy-in" of all members of the group throughout the process. In order to ensure that the "buy-in" is there from the start it is necessarily to agree the common aims of the group and to agree to a process for meeting those aims before starting that process. This makes facilitated sessions appear to go slowly at the beginning but this apparent slowness will be compensated for as the group gets into its stride and the common goals and "buy-in" throughout ensures that they work as one.

Brainstorming - useful for developing ideas

Brainstorming is a useful method for identifying a wide range of ideas to solve a problem. It involves the group calling out the ideas which are then be recorded onto a flip chart. All ideas should be recorded and the session should be as free flowing as possible. Sessions can last any time from a few minutes to hours depending on the difficulty and complexity of the problem. Often the best ideas can come when the session appears to be all but finished.

When the free flow appears to slow it is often useful if the facilitator suggests a different situation such as "What would a politician do if he had this problem" or "How would they solve it in the navy".

It is useful to post a set of rules at the beginning of the brainstorm. These should be agreed with all those taking part. A suggested set is as follows;
- No discussion of ideas
- Everyone to contribute
- Problem definition displayed
- Lots of ideas
- Positive encouraging atmosphere
- Allow time for thought
- Accept every idea no matter how crazy

Conceptual Models - useful for understanding initial ideas

When a group comes together to investigate a possible way forward for the future its individual members often have clear ideas of how they would see the future mapped. It is important that each member of the group has an opportunity to express those ideas at an early stage so that all members of the group can recognize the basic paradigms behind the thinking of the others in the group. Often these conceptual models are quite different but are still complimentary and can be used as the basic building blocks of the final deliverable.

Conceptual models are best recorded as a mixture of graphics and words on a flip chart.

Ranking and Rating- used for analysis of data

Following a brainstorm it is often useful to analyze the list formed to determine priorities. There are a number of methods of undertaking this type of analysis.

Simple Tally
Each member of the group are given the chance to come to the sheets with the list of ideas and to place tally marks against (say) the top 5 items in their view. Items are prioritized according to the tally score. This is useful for its speed; it also has the benefit that group members need to get up out of their seats to write at the flip chart.

Weighted Tally

A slight variation on the above is the *weighted tally*. Each member of the group is asked to come to the front and score the ideas on the list from (say) five to one with five being their top score. The additional "gearing" has the effect of separating close scoring.

Consensus Marking

Where time is short, the list is long and the group is small. The members of the group can be asked to call out marking against (say) 1 to 10 for each item on the list. Providing the group is working well together an initial call may be challenged until a consensus is reached. The debate that ensures in reaching the consensus is often useful in increasing the understanding of the particular point.

The Multiplier Tally (or Consensus)

Often there are two criteria against which items need to be judged, for example "effectiveness" and "ease of implementation". Once again tally style scores are taken from each of the participants but this time it will be under each category. The two numbers are then multiplied to create the final priority list, although it is sometimes useful to also look at high scores under each of the criteria.

Force Field Analysis - useful for the analysis of the merits of apparently conflicting ideas

Simple Force Field

In its simplest form two ideas or solutions are written down either side of a line. The group is then asked to identify pressures that will move the line in either direction to either of the solutions. For example if the problem to be solved was inaccuracy in expense claims and one solution was to place them on computer while the other was a more complex paper form then the pressures may be as follows.

Towards the computer system;
Most errors are mathematical computer will resolve this
Computer system will check mileage to counter dishonesty
Computer system will check for level of expense against guidelines
VAT correctly accounted
User has previous expense claims to hand to check details

Towards the paper systems;
Some users still not familiar with computers
Paper system allows receipts to be submitted at the same time
If arrows are placed against the "forces" with their length approximately proportional to their effect then the picture of which is the best solution

Neutral Statements Force Field

The Force Field analysis can be used to assess up to about 5 options using a variation. Each of the options is identified with a symbol and a series of neutral statements is determined by which the options can be judged. For the example above such statements may include speed of payment, consumer usability, system usability, accuracy, outlying office use. Marking judgements are usually developed by consensus with the group and the appearance for the two options above might be something like that shown below.

Black Ball Analysis - useful for comparing a number of options

For Black Ball analysis each of the options is given a name and are then listed down the side of a flip chart. The participants are then asked for the criteria against which they wish to judge the various options. The number of criteria should ideally be restricted to about 6 to make for a practical way forward. Each criteria is then taken in turn and the options discussed. If an option fully meets the specific criteria it is given a black ball. If it partially meets the specific criteria it is given a half black ball and if it generally does not meet the criteria it is given a white ball. A simple addition at the end yields the answer as to the best option while the overall pattern of balls on the flip chart can sometimes be used to identify areas where, for instance, all of the options are weak.

Cause and Effect Analysis and Solution Effect Analysis (Fishbone) - useful for determining the root cause of a problem or for analysis of potential solutions

This form of analysis can best be appreciated from a diagram.
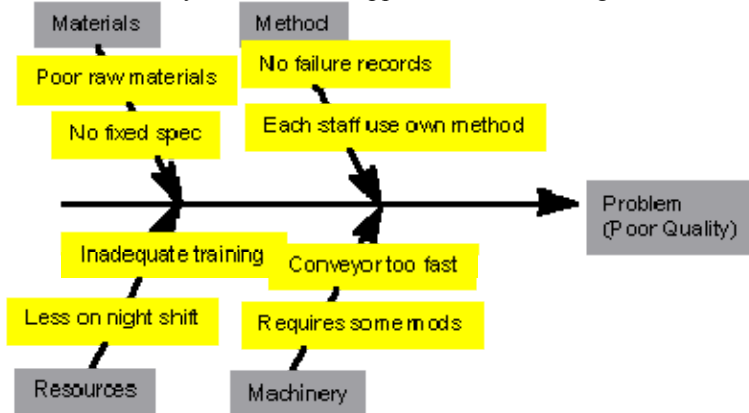
The headings at the end of each arm need to reflect the nature of the problem. In cause and effect the team is looking at potential factors that may lead to the "effect" or problem. The solution / effect diagram is the same shape but works the other way round. At the head is the solution the team are looking for potential effects out on the arms. This is useful for testing whether there are likely to be any likely unwelcome side effects to a solution.

Fishbone diagrams can be used as part of the normal tool kit in meetings or workshops or alternatively they can be pinned to the wall and contributions sought on "Post-It-Notes"™ over a period of time.
Whichever system is used the result will be a series of categorized possibilities along the arms (or bones!). The next aim is to look for links between those possibilities to begin to understand the root causes in the case of cause and effect or possible unwanted effects in the case of solution effect.

Process Flow Diagrams - useful for determining a series of actions

Process flow diagrams outline in order the steps necessary to complete a task. It is not always easy to recognize all of the steps necessary and it is frequently necessary to use a variant of the brainstorm to collect a list of likely steps. Each member of the group is asked to write onto "Post-It-Notes"™ suggestions for the steps; these are collected and categorized before starting the diagram. The easiest way forward is to then ask for the first and last steps followed by the step nearest the middle. The gaps between these can then be looked at in a similar way by filling an item near the middle each time until the overall diagram takes shape.

Analysis at the end should endeavour to remove nay steps which cause a return backwards as these are where the inefficiencies are to be found.
With the addition of time and resource allocation process flow diagrams become a planning network.

Source: http://www.users.waitrose.com/~dhollis/tq/facilt.htm

2.   Icebreakers

Source: http://www.nwlink.com/~donclark/leader/icebreak.htmlor the

For the following activities, it often helps to break the group into couples or trios. The smaller groups allow for more discussion, keeps participants from mentally wondering off, builds rapport, and allows for "one-on-one" relationships.

You can also break a large group into small groups by having them discuss the activity with the person behind them, or having people take a different seat when they return from breaks or activities. The idea is to get them to meet and learn about other people besides their friends or favorite partner.

Icebreakers
Icebreakers are structured activities that are designed to relax learners, introduce them to each other, and energize them in what is normally an unduly formal atmosphere or situation. Icebreakers are not normally related to the subject matter, where as "openers" are related to the subject matter that is to be discussed. In addition, they often help to break up the cliques and invite people to form random groupings in a non-threatening and fun way.

The term "icebreaker" comes from "break the ice", which in turn comes from special ships called "icebreakers" that are designed to break up ice in the arctic regions. And just as these ships make it easier for other ships to travel, an icebreaker helps to clear the way for learning to occur by making the learners more comfortable by helping to bring about conversation.

Listed below are a few icebreakers to help get you started.

The Magic Wand
You have just found a magic wand that allows you to change three work related activities. You can change anything you want. How would you change yourself, your job, your boss, coworkers, an important project, etc.? Have them discuss why it is important to make the change. Another variation is to have them discuss what they would change if they become the boss for a month. This activity helps them to learn about others' desires and frustrations.

Marooned
You are marooned on a island. What five (you can use a different number, such as seven, depending upon the size of each team) items would you have brought with you if you knew there

was a chance that you might be stranded. Note that they are only allowed five items per team, not per person. You can have them write their items on a flip chart and discuss and defend their choices with the whole group. This activity helps them to learn about other's values and problem solving styles and promotes teamwork.

The Interview
Break the group into two-person teams (have them pick a partner that they know the least about). Have them interview each other for about twenty minutes (You can also prepare questions ahead of time or provide general guidelines for the interview). They need to learn about what each other likes about their job, past jobs, family life, hobbies, favorite sport, etc. After the interviews, reassemble the group and have each team introduce their team member to the group. This exercise helps them to learn about each other.

Who Done That?
Prior to the meeting, make a list of about 25 items relating to work and home life. For example, a list for a group of trainers might have some of the following:

o   Developed a computer training course
o   Has delivered coaching classes
o   Is a mother
o   Knows what ADDIE means and can readily discuss it
o   Enjoys hiking
o   Has performed process improvement
o   Served in the Armed Forces
o   Is a task analysis expert

Ensure there is plenty of space below each item (3 or 4 lines) and then make enough copies for each person.

Give each person a copy of the list and have them find someone who can sign one of the lines. Also, have them put their job title and phone number next to their names. Allow about 30 minutes for the activity. Give prizes for the first one completed, most names (you can have more that one name next to an item), last one completed, etc. This activity provides participants with a list of special project coaches and helps them to learn about each other.

The ADDIE Game (Analysis, Design, Development, Implement, Evaluate)
Make up a reasonable problem scenario for your organization where people need to get introduced, e.g. *"The manufacturing department is bringing in 20 temporaries to help with the peak season. They want us to build a short activity that will allow the permanent employees to meet and introduce themselves to the temporaries."* Break the group into small teams. Have them to discuss and create a solution:

- Analyze the problem - Is it a training problem? If they decide that it is not a training problem, then remind them that most problems can be solved by following an ADDIE type approach.
- Perform a short task analysis - How do people get to know each other?
- Design the activity - Develop objectives, sequence.
- Develop the activity - Outline how they will perform the activity and trial it
- Implement - Have each small team in turn, introduce themselves in front of the group using the activity they created.
- Evaluate - Give prizes to the most original, funniest, etc. by having the group vote.

This activity allows them to learn about each other's problem solving styles and instructional development methods, it also introduces the members to each other. This method can also be used to introduce the ADDIE method to new trainers. Time - about 60 minutes.

Finish the Sentence
Go around the room and have each person complete one of these sentences (or something similar):

o   The best job I ever had was...
o   The worst project I ever worked on was...
o   The riskiest thing I ever did was...

This is a good technique for moving on to a new topic or subject. For example, when starting a class and you want everyone to introduce themselves, you can have them complete "I am in this class because..."

You can also move on to a new subject by asking a leading question. For example if you are instructing time management, "The one time I felt most stressed because I did not have enough time was ..."

Reviews
While icebreakers are used to start a learning session, reviews are used in the closing of a session or module. They help to reinforce key concepts or topics.

Frame Game
Give each learner four blank cards and instruct them to fill in four different responses on the subject: "What were main concepts or learning points of the material we just covered?" Give them about five minutes to complete the exercise, then collect the cards, shuffle them, and randomly deal three cards to each learner. (Note: If desired, the trainer can make up four cards of her own, but they should be philosophically unacceptable with the principles presented. That is, play devil's advocate.)

Ask everyone to read the cards they just received, and then to arrange them in order of personal preference.

Place the extra cards on the table and allow them to replace the cards in their hand that they do not like. Next, ask them to exchange cards with each other. They must exchange at least one card.

After about three minutes, form them into teams and ask each team to select the three cards they like the best. Give them time to choose, then have them create a graphic poster to reflect the final three cards.

Select or vote on best poster that best represents the topic.

Rearrange the Classroom (Change)
Prior to class, set the desks up in the old "traditional" classroom row style. Except, that you should set your stage (podium, flip chart, etc.) in the back of the class. Start your presentation (you will be behind them, facing their backs). Explain to them that this is how a lot of change is implemented in organizations. The leaders get behind their employees and attempt to "push" them into change. And the attempt to change is about as successful as trying to conduct a class this way.

Also, point out that this is how a lot of traditional organizations are set up, in nice even rows (departments), where it is hard to communicate and learn from each other. But, real teams develop when we break out of our boxes and design organizations that have cross functional teams working with each other. Ask them to rearrange the room so that real learning,

communication, and teamwork can take place. Depending upon your learners, you might have to give them a few pointers to get started, but then get out of the way.

During the next break or after lunch, have them rearrange the room again, using some of the techniques that they learned. This can be repeated several more times, depending upon the length of the presentation. But, each time they change the setting, it needs to reinforce a concept that they previously learned.

Toy Story
Using Legos, Tinker Toys, clay, log cabins, etc., have each person or small group build a model of the main concept that they have just been presented. After a given time period, have each person or team present their model to the group. They should describe how their model relates to their work or the subject being taught.

Encourage creativity!

Ball-Toss
This is a semi-review and wake-up exercise when covering material that requires heavy concentration. Have everyone stand up and form a resemblance of a circle. It does not have to be perfect, but they should all be facing in, looking at each other. Toss a nerf ball or bean bag to a person and have tell what they thought was the most important learning concept was. They then toss the ball to someone and that person explains what they though was the most important concept. Continue the exercise until everyone has caught the ball at least once and explained an important concept of the material just covered.

Process Ball
This is similar to the above exercise, but each person tells one step of a process or concept when the ball is tossed to them. The instructor or learner, in turn, writes it on a chalkboard or flip chart. For example, after covering "Maslow's Hierarchy of Needs," you would start the ball toss by having everyone give one step in the pyramid of needs, e.g. Safety, Physiological, Esteem, etc.

Motivators
Motivators are designed to help encourage the learners.

Positive Reinforcement Cards
Whenever a learner arrives to class on time from breaks, lunch, etc. give them one playing card. You can also hand out cards to people who volunteer for activities, are helpful, answers a

difficult question, etc. At the end of the day, play one hand of poker. However, the only cards that are used are the ones that were given out throughout the day. Give a small prize to the best hand (you can also pick the top two or three hands if you are able to give away more prizes). Note that the more cards a person has, the better the chance of winning.

Calm Down!
Sometimes the problem is not warming up, but the need to calm or "come down to reality" after a session of intensive material is given. Also, to get the full benefit of new material, some "introspective time" might be needed.

Have the learners lay their heads on their desks, lay on the floor, or get in a comfortable position. Then, have them reflect on what they have just learned. After about five minutes, say a key word or short phase and have them reflect on it for a couple of minutes. Repeat one or two more times then gather the group into a circle and have them share what they believe is the most important points of the concept and how they can best use it at their place of work.

Note: This may seem like slack time to many, but reflection is one of the most powerful learning techniques available! Use it!

3.   Sample Pre-Session Questionnaire

Name: _____

Organization:_____

Position:_____

How long have you been with the organization?_____

How do you think you learn best?
☐ By listening (Audio Learner)
☐ By doing -- practical, hands-on method (Tactile Learner)
☐ By seeing a demonstration by instructor, slides, or visual aids (Visual Learner)
☐ By discussing concepts with others or asking questions (Interactive Learner)
☐ By practicing – role plays, practice demonstrating skills (Kinaesthetic Learner)
☐ A combination of the above (examples)
_____
☐ Not sure how you prefer to learn

What do you expect from this workshop? Do you have any specific expectations?

_____
_____
_____

Do you have special considerations you want to share with the facilitator? (Learning challenges)?

_____
_____
_____

Other comments

_____
_____
_____
_____
_____
_____

Adapted from the Trainers Handbook and Success Strategies for Adjunct Faculty.

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