

FACILITATOR RESOURCE

Customization Guidelines



Facilitator freedom lives in delivery.
Curriculum stability lives in materials.

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Introduction

These guidelines are intended to support clarity, confidence, and consistency in private workshop delivery for CTRI & ACHIEVE.

We recognize that facilitation is a deeply relational practice that requires responsiveness and sound professional judgement in the moment. No document can fully capture everything that goes into creating an exceptional learning experience!

This guide reflects our shared intention to care for the curriculum, our client partnerships, and the learning spaces we create together – while honouring the stories, relationships, lived experiences, cultural backgrounds, and ways of knowing that facilitators hold. It is not meant to limit creativity or replace professional judgement.

We trust facilitators to respond thoughtfully to the needs of organizations and communities. Our diversity is what makes our work resonate with the organizations and communities we serve.

These guidelines are about:

- Additional support for our valuable work
- Shared trust and partnership
- Prevention through guidance
- Conversation, not discipline
- Establishing clarity as our work grows in complexity and reach

In the rare event of a Scope (as per contract) Change Request from a client:

Step 1: Acknowledge the request respectfully.

Step 2: Capture and park the request.

Step 3: Consult with [Joddie](#) (CTRI) or [David](#) (ACHIEVE).

Step 4: If approved, the office will change scope and billing for the facilitator and resend the contract.

When in doubt, reach out!

- [Joddie Walker](#) | Clinical Director (CTRI)
- [David C. Jung](#) | Director of Training and Development (ACHIEVE)
- [Wendy Loewen](#) | Chief Content Officer (CTRI & ACHIEVE)

How to Use These Guidelines

These guidelines are presented in a question-and-answer format, with each section marked by a traffic-light symbol to show whether a practice is approved, requires a boundary check, or is not permitted.

GREEN = GO (APPROVED)

The practice is approved and appropriate to proceed.

This may include:

- Adapting delivery to fit client needs and facilitation style
- Proceeding without additional approval while maintaining professionalism, respect, and sensitivity to culture and diversity

YELLOW = SLOW (BOUNDARY CHECK)

Slow down, assess context, and confirm boundaries before proceeding.

This may involve:

- Checking in with the appropriate CTRI & ACHIEVE contact
- Checking with the client (and, when appropriate, documenting shared agreement)

RED = STOP (NOT PERMITTED)

The practice is not permitted and should not be used.

This may involve:

- Not proceeding with the approach or modification
- Consulting with the appropriate CTRI & ACHIEVE contact
- Referring the request back to the client or CTRI & ACHIEVE leadership for review

Green = GO (Approved)

CURRICULUM RELEVANCY

Question: Can I bring forward any observations about curriculum relevancy? This refers to curriculum aspects that are outdated or are no longer best practice (e.g., language, theories, best practices, models, etc.).

Answer: Yes. That is a content review issue, not a facilitation fix.

You are invited to:

- Flag the observation(s) and let the appropriate CTRI & ACHIEVE contact know
- Share why the observations feels worthy of a mention (For example, has new research on the topic emerged? Did you read about a new topic approach or model?)

IMPROVING CURRICULUM

Question: Can I share curriculum improvement ideas?

Answer: Always! We welcome feedback and value facilitator insight. You are experts in the field.

You are invited to customize:

- Tone, presence, facilitation style
- Pacing (slowing down, speeding up, pausing, repeating, summarizing)
- Verbal emphasis (what you highlight vs. move through more quickly)
- Your metaphors, stories, examples and workplace applications
- Reflection questions, discussion prompts and debrief methods
- How you respond in the room to resistance, emotion, conflict, or misunderstanding
- How you explain concepts verbally (simplifying and clarifying, including translating into audience languages such as French, Cree, Ojibwe, etc.)

SHARING STORIES AND EXPERIENCES

Question: Can I share my stories and lived experience?

Answer: Absolutely! Stories, metaphors, and examples related to the workshop topic shared by facilitators remain yours. They reflect lived, cultural, and relational knowledge. When shared within CTRI & ACHIEVE workshops and documented or recorded through approved processes, they may be referenced for learning purposes as part of our partnership, without diminishing ownership or cultural meaning.

Make sure your stories, metaphors, and examples build upon the workshop topic or make the content more relatable and understandable. Everything “extra” should always support workshop learning objectives and purpose.

SIMPLIFYING DENSE POWERPOINT SLIDES

Question: Can I simplify dense PowerPoint slides?

Answer: Yes. While the general expectation is that slide content remains intact, we trust facilitators to use sound professional judgement when navigating client learning needs.

You are invited to:

- Summarize content out loud
- Teach from the intent rather than reading slides verbatim
- Break content into smaller chunks verbally
- Use stories, metaphors, and examples to support understanding

ADAPTING CONTENT TO THE ORGANIZATION

Question: Can I make the content relevant to the client's organization?

Answer: Definitely. Customization is about making the content relatable to the client's organization – specifically to their workplace culture, values, and, more importantly, the goal of the training.

You are invited to:

- Connect content to the client workplace culture, values, mission, strategic priorities, or internal language
- Adjust learning activities to be reflective of client-specific situations and examples
- Adjust framing (such as the introduction) to fit participants' roles and workplace realities

When adjusting learning activities, ensure the modified activities still align with the workshop's learning objectives. All learning activities should assist participants in achieving the workshop learning objectives.

CLIENT BRANDING REQUESTS

Question: If requested by the client, what branding elements may be added?

Answer: You are invited to add:

- A client-branded opening slide when requested by the client
- A client-context slide (mission, values, strategic priorities, service model, internal language)

These slides support relevance while protecting curriculum integrity.

IMPROVING READABILITY AND CLARITY

Question: What small changes can I make to improve clarity and readability of curriculum?

Answer: You are invited to:

- Correct typos (spelling, punctuation, obvious grammar)
- Make minor formatting adjustments for readability (spacing, alignment)
- Include page numbers in the presentation corresponding to the training manual as part of your preparation for the workshop

REQUIRED FOLLOW-UP (IMPORTANT)

If you correct a typo or notice an error in slides or manuals, please notify the appropriate CTRI & ACHIEVE contact so the primary version can be updated. This supports consistency across future deliveries.

Do not treat typo fixes as an opportunity to rewrite significant content.

FLIP CHARTS OR WHITEBOARDS

Question: How should flip charts or whiteboards be used for live capture during the workshop session?

Answer: You are invited to use flip charts or whiteboards to:

- Summarize group learning, themes, and commitments
- Create “client capture” summaries during the session
- Capture ideas live

When adapting or reviewing the workshop materials, please use *Microsoft Word or PowerPoint* only. Do not create or edit files in other platforms or export them back to Microsoft as this interferes with our templates.

Yellow = SLOW (Boundary Check)

CUSTOMIZING MATERIALS

Question: How should I respond when a client requests customization or additions to session materials?

Answer: Each facilitator is a trusted representative and professional partner in learning.

- If a change affects what participants could reasonably interpret as CTRI & ACHIEVE course content (what they see, quote, take home, or treat as curriculum), it belongs in YELLOW or RED, not GREEN.
- If a change maintains the integrity of the curriculum and the CTRI & ACHIEVE experience, you can proceed with caution.

CUSTOMIZATION CATEGORIES

What follows are the categories of customization requests and guidance for responding to each.

ADDING SLIDES (ALLOWED TYPES VS. NEEDS APPROVAL)

Usually acceptable additions (within boundaries):

- Reflection slides and debrief prompts
- Activity instructions
- Blank placeholder slides
- Client-relevant scenarios used to support discussion (not replace curriculum)
- Client capture slides (participant insights, themes, flip chart summaries)

Boundary check required:

- Slides that introduce a new framework or model
- Slides could reasonably be interpreted as CTRI or ACHIEVE core workshop content but are not included in the official training manual
- Slides that alter the learning flow or replace curriculum explanations

If a slide begins to teach new content, it requires review.

EXTERNAL SOURCES (BOOKS, MODELS, ARTICLES)

These sources are sometimes appropriate as enrichment, not replacement.

Boundary check required:

- The resource introduces a new model or framework
- The external concept becomes central or foundational to the teaching material, rather than serving as a supporting reference
- It could reasonably be interpreted as curriculum rather than illustration

If approved:

- Use lightly (as a supporting illustration, not the backbone)
- Do not replace core curriculum flow
- Include clear source attribution on the slide
- Do not distribute as a handout unless approved

Slide attribution (required when using external sources):

- Place attribution directly on the slide (bottom left or right)
- Keep it short and readable
- Include author/source, work, and, when possible, year and link
- If adapted, note “Adapted from...”

ADDING CLIENT BRANDING BEYOND OPENING SLIDES

Boundary check required:

- Adding client logos to multiple slides
- Re-theming sections of the deck
- Co-branded decks
- Changes that could imply curriculum ownership or transfer to the client

If deeper branding is required, this becomes a scoped customization project.

AI IMAGES

Preferred option is copyright-free images that are clearly marked as "free for commercial use."

Boundary check required if using AI-generated images:

- Check in with the appropriate CTRI & ACHIEVE contact
- Confirm client comfort if images will be shown
- Use professional and cultural discretion; avoid images that reinforce stereotypes or that support unconscious bias

CREATING OR DISTRIBUTING HANDOUTS

Boundary check required:

- Independent handouts or templates
- Bonus take-home materials resembling curriculum
- Follow-up materials resembling curriculum
- Review with your respective lead ([Joddie CTRI](#) | [David ACHIEVE](#)) before use

When adapting or reviewing the workshop materials, please use *Microsoft Word or PowerPoint only*. Do not create or edit files in other platforms or export them back to Microsoft as this interferes with our templates.

Red = STOP (Not Permitted)

REWRITING CURRICULUM

Question: Can I rewrite curriculum to “fix” a perceived issue or to fix something “on the fly”?

Answer: No. Curriculum changes are not permitted to ensure curriculum consistency, accuracy, and alignment.

Not permitted:

- Rewording, restructuring, or rewriting content
- Deleting meaning-bearing concepts
- Removing definitions, steps, models
- Replacing frameworks or altering curriculum flow
- Rewriting curriculum during delivery
- Swapping frameworks at client request
- Changing learning activities without purpose or linkage to client experience
- Changes that affect what participants could reasonably interpret as CTRI & ACHIEVE course content (what they see, quote, take home, or treat as curriculum)

AI-GENERATED CONTENT

Question: What is the policy on using AI-generated curriculum and materials?

Answer: The use of AI to create, rewrite, or produce curriculum or participant-facing materials are not permitted.

Not permitted:

- AI rewriting educational content
- AI-generated curriculum
- AI-generated distributable materials
- Uploading CTRI & ACHIEVE IP into AI tools
- AI-generated videos

TRANSCRIPTION AND AI RECORDING TOOLS

Question: What is the policy on using recording, AI bots, and transcription during workshops?

Answer: The use of AI bots and transcription tools are not permitted without written contractual permission.

Not permitted:

- AI bots that record or transcribe
- Unauthorized third-party recording tools

Accessibility features (such as live captioning) may be acceptable and are distinct from recording.

VIDEOS

Question: Is it appropriate to use unapproved embedded or front-of-room videos during a session?

Answer: No. The use of unapproved embedded or front-of-room videos is not permitted in curriculum materials or live sessions.

Not permitted:

- Unapproved embedded videos in slide decks
- Playing YouTube front-of-room in paid sessions

IMPORTANT NOTES ON VIDEO USE

Some workshops include pre-approved internal videos available on the CTRI & ACHIEVE Trainer Site. These videos have already been reviewed, cleared, and prepared for use and may be used as indicated.

If you are considering using additional, external videos **beyond our internal library**, the below guidelines apply.

- Use no more than one external video per workshop or session.
- External videos must be **no longer than three minutes** in total.

- Videos should support reflection or discussion and not replace or overshadow the curriculum.
- Overuse of videos can dilute focus and learning depth; thoughtful, limited use is encouraged.
- Like all support materials, videos should be chosen with the intention to helping the participants achieve the learning objectives.

Why the Three-Minute Guideline Matters

Videos are most effective when they serve as a brief spark rather than a substitute for facilitation. In both three-hour and six-hour workshops, shorter clips help maintain attention, reduce cognitive overload, and keep the facilitator and curriculum at the centre of the learning experience. Limiting video length supports focus and meaningful discussion, ensuring the video enhances rather than competes with the core content.

COPYRIGHT AND PLATFORM CONSIDERATIONS

- Confirm that the video is free and permitted for use in paid, professional training settings.
- Availability on platforms such as YouTube does not guarantee legal use.
- Be cautious of secondary or reposted content. Some platforms allow viewing for personal use only and prohibit public or paid use.
- It is the facilitator's responsibility to confirm that the original source permits this type of use.

If there is **no clear** permission for use in paid and public settings, facilitators are strongly encouraged to do one of the following options:

- Select a different video with clear usage rights.
- Replace the video with storytelling, lived experience, metaphors, or discussion.

PRE-SCREENING GUIDANCE

Based on our experience, some sources are very unlikely to grant permission:

- Major film studios, television networks, streaming services, etc.
- Movies, TV shows, commercials, clips from large media corporations
- Competitor training organizations or proprietary commercial training content

In contrast, permission is sometimes possible when videos come from:

- Independent creators
- Educational institutions
- Nonprofit or community organizations

This guidance is not absolute, but it helps assess feasibility before submitting a request.

REVIEW AND APPROVAL PROCESS

If an external video feels essential:

01 | Locate the original source and confirm usage permissions (where possible)

02 | Submit the Video Use Request Form (available on the Facilitator Site) or permission to use from the official owner of video to David Jung **at least two weeks in advance of the workshop.**

For the external video request include:

- The direct video link
- The exact start time and end time of the clip you wish to use (max 3 mins)
- Any available documentation confirming permitted use in paid training settings
- If no usage permission can be located, we can attempt to look for it

NOTE ON TWO-WEEK TIMELINE

The two-week timeline is essential. This allows the CTRI & ACHIEVE office adequate time to:

- Review the content
- Assess licensing and permissions

Licensors are often slow to respond or may not respond at all. If permission cannot be clearly confirmed or secured, the video cannot be used.

If approved, the video may be used only for that specific workshop or session.

Permissions can change over time, so approval must be requested again for future use, even if the same video was previously approved.

ALTERNATIVE TO SHOWING VIDEO LIVE

When appropriate, an alternative approach may be used:

- Share the video link on a slide
- Participants view the clip on their own devices
- Facilitate a group debriefing or discussion afterward

PREFERRED PRACTICE

Whenever possible, facilitators are encouraged to rely on:

- Personal stories and lived experience
- Professional examples
- Metaphors and illustrations
- Facilitated discussion

Final Thoughts on Videos

These approaches often create deeper connection and learning than media alone.

When in doubt, reach out early so we can support you in navigating video use responsibly, creatively, and in alignment with our shared standards.

When adapting or reviewing the workshop materials, please use *Microsoft Word or PowerPoint only*. Do not create or edit files in other platforms or export them back to Microsoft as this interferes with our templates.