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THE DUAL ROLE OF FACILITATOR AND LEARNING DESIGNER: DESIGN DECISIONS AND BLIND SPOTS

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Clare Morton

INTRODUCTION

Facilitators who also hold a role as a learning designer, referred to here as dual role practitioners, can apply design principles to help produce a learning experience that is engaging for and relevant to their ākonga. Being a dual role practitioner can give you the benefit of knowing who your ākonga are and what learning design decisions would suit them. However, a dual role can also cause blind spots. Assumptions could be made about what works for your ākonga without checking that it is grounded in good learning design. This article will explore this effective learning design and blind spots using a hypothetical practical workshop as an example. This is a one-day, hands-on, facilitated workshop that is part of a series of workshops aiming at covering one topic per session. Ākonga will already be familiar with the concepts explored within the workshop—this article brings these concepts together through practical application.

Context

I am a tertiary lecturer who has a role as a facilitator and learning designer. This means that I facilitate courses and revise existing content to improve its visual and learning design aspects. Having both roles has changed how I view my role as facilitator, as I now look at the existing material through a design lens rather than just a delivery lens. This helps me to see the material as the ākonga would see it.

The example used throughout this article is a hypothetical scenario based on a flower composting workshop focusing on practical techniques for a small flower farm.

THE LEARNING AND TEACHING SEQUENCE

The workshop is held on a weekend to allow ākonga to attend who would otherwise be working. The teaching and learning sequence was developed by the facilitator who was taking the workshop and the learning design principles were applied by that same facilitator, allowing the dual role to work.

The first part of the workshop builds engagement based on a Universal Design for Learning (UDL) framework (CAST, 2024) and develops connections through whakawhanaungatanga, bringing together ākonga who share similar interests and values (Mead, 2003). Once that connection has been made, they are more ready to engage with the content and learning, and the workshop

moves into setting goals for the day. Setting goals in a practical workshop helps to make the learning feel real and motivates ākonga to participate in the workshop. Finally, discussing health and safety not only develops awareness as required for compliance, but also helps to establish trust that the workplace is safe, which then leads to a feeling of security.

The second part of the morning session combines practical demonstrations with discussions. This cycle of demonstrate, discuss, and practice helps the facilitator control the direction of the learning. Breaking the learning into small, manageable steps makes the content easier for ākonga to understand. UDL principles are represented here by presenting the content through live demonstrations, an infographic, and step-by-step verbal instructions to appeal to the different ways ākonga engage with the content.

Sharing lunch in the middle of the day reinforces connections within a group aligned around the same goals. Exchanging stories and sharing kai builds relationships and promotes a sense of belonging: the value of whanaungatanga.

The afternoon's structure mirrors the morning session, bringing familiarity to the workshop so the ākonga feel comfortable following the same progression. The reflection at the end of the session is based on the UDL engagement principles to help ākonga self-regulate their own progress and motivation. This allows ākonga to reflect on what they have learnt throughout the workshop and how they can use this learning in the future. The wrap-up at the end of the session allows for final thoughts and future planning for the next workshop.

THEORETICAL GROUNDING

A teaching and learning sequence and a well-suited infographic for a practical workshop draw on key learning theories and models. These all work together to create a learning environment that is ākonga-centred and helps to promote understanding, confidence, and authentic skill development.

The foundation of a practical workshop is grounded in social constructivism (Vygotsky, 1978), which views learning as a social and interactive process. This approach supports quality learning by fostering collaboration, dialogue, and shared activities—central elements of effective adult education (Brookfield, 2017; Tertiary Education Commission, 2020). When ākonga work together through discussion and practical activities, they co-construct knowledge by linking new information to prior experiences (Fosnot, 2013). Practical activities provide immediate application and feedback, while collaboration enables ākonga to clarify thinking through dialogue, reflection, and peer support.

Alongside this social approach, the workshop design reflects cognitive load theory (Sweller, 1988), which contributes to quality learning by ensuring instructional materials support comprehension and reduce unnecessary mental effort. Managing cognitive load enables ākonga to focus on essential concepts, promoting understanding rather than confusion (Sweller et al., 2019). Clear graphics, bullet points, and plain icons on the infographic, combined with step-by-step facilitator demonstrations, reduce extraneous cognitive demands, and enhance engagement. Freeing cognitive resources allows ākonga to focus on collaboration and practical problem-solving, complementing the social constructivist approach.

As described above, a Universal Design for Learning framework (CAST, 2024) is applied to ensure that information is accessible in multiple ways. UDL Guidelines 3.0 promote engagement,

representation, and action and expression. In a practical workshop, ākonga engage through visual (infographic), auditory (facilitator explanation), and kinaesthetic (practical hands-on) modes. Ākonga demonstrate understanding through collaborative practice and problem-solving rather than solely through verbal or written responses. Providing multiple avenues for engagement and expression ensures inclusion, accessibility, and meaningful participation, reinforcing that knowledge is actively constructed.

Designing a teaching and learning sequence requires a deliberate commitment to diversity and inclusivity and learning design principles rather than simply relying on facilitator instinct. By incorporating a range of instructional methods—including group discussion, facilitator demonstrations, visual resources, and practical activities—ākonga can engage in ways that suit their individual strengths and learning styles (CAST, 2024). This variety maintains interest and motivation while promoting equitable access, reflecting widely recognised principles of effective adult learning (Brookfield, 2017). The integration of multiple means of engagement, representation, and expression reduces barriers and allows ākonga to demonstrate understanding in diverse ways, supporting a high-quality learning experience for all participants.

Key to this commitment to diversity and inclusivity are the mātauranga Māori principles of whanaungatanga and whakawhanaungatanga, which foster connection, belonging, and reciprocity through both the cultivation of relationships and the relationships that result from them (Ako Aotearoa, 2023). These principles are woven through the workshop introduction and shared kai, encouraging interaction, reflection, and relationship-building—important aspects of culturally responsive learning. The principle of ako is demonstrated as learning becomes reciprocal: ākonga share prior knowledge and experiences while the facilitator guides, models, and learns from their insights. This mutual exchange reinforces collaborative learning, ensuring knowledge is co-constructed rather than delivered in a one-way format. Integrating these mātāuranga Māori principles alongside social constructivist and UDL principles strengthens inclusivity and engagement, supporting a high-quality learning experience.

Connecting all these elements across both the workshop and infographic results in a learning experience that is theoretically grounded and practically effective. Social constructivism and collaborative learning foster participation, shared understanding, and relevance; cognitive load theory and UDL ensure cognitive clarity, accessibility, and inclusivity; and whanaungatanga, whakawhanaungatanga, and ako bring depth through cultural connection and reciprocal learning. Together, these approaches provide multiple avenues for engagement, reflection, and knowledge construction, particularly when the designer and facilitator are in a dual role.

THE INFOGRAPHIC AS A LEARNING TOOL

The infographic includes images and colours that relate to the workshop content, along with smaller chunks of information to help ākonga who need a visual guide to support their learning, providing multiple means of representation in line with the UDL guidelines. Breaking the information into smaller visual pieces reduces cognitive load and helps with learning. A dual-role practitioner's experience then draws on both design training to understand what works visually, such as colour matching, arrows, and chunked information, and facilitation experience (when and how to introduce the infographic). This combined knowledge helps to create an infographic that suits the learning needs of ākonga.

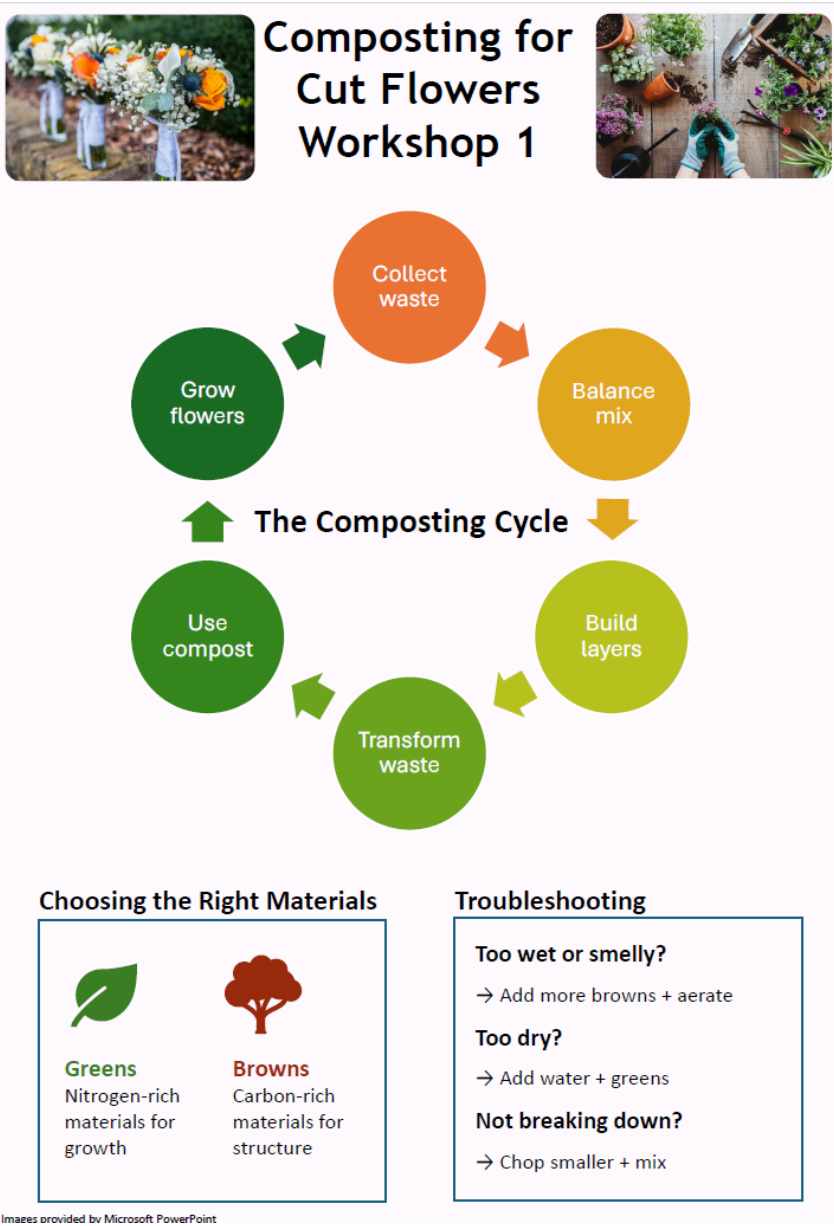


Figure 1. Infographic designed for flower composting workshop illustrating the key steps, with boxed text on choosing the right materials and troubleshooting to support ākonga engagement.

THE DUAL ROLE IN PRACTICE

Being a facilitator and a learning designer brings both strengths and challenges when it comes to designing a quality learning experience. An experienced dual-role practitioner knows the content and how to facilitate a well-run teaching session, leading them to understand the learning design needed for teaching. They can then produce learning materials that are grounded in both content knowledge and learner needs.

The roles of learning designer and facilitator are interconnected. The relationship between the two means that learning how to be a designer can change the approach to creating learning materials beyond just relying on the facilitator's experience. From a facilitation perspective, this includes knowing how to sequence the learning, along with noticing when ākonga need a break and being able to adjust the learning accordingly. From a design perspective, this means introducing new approaches to teaching materials such as using simple colours, white space, and consistent spacing using rulers and gridlines. By contrast, a facilitator using another's design plan may feel more constrained to follow that plan rather than using their experience to judge how ākonga are responding and adjusting the learning to suit.

Overcoming limitations

Issues in design can arise when facilitators are too close to the content and rely on assumptions about what works, even if based on their experience, rather than on solid design principles. A facilitator might equate more content with better learning, for example; however, this can overwhelm ākonga and increase extraneous cognitive load. A facilitator can guard against these blind spots by deliberately applying learning design principles throughout their learning materials and by having the content peer-reviewed by another learning designer. A review should be carried out to ensure that learning design principles have been applied, rather than just to check the content. Designers should look for design inconsistencies throughout the learning materials and ensure that cognitive load is managed by reducing clutter in the materials.

However, a dual role may not be realistic in an organisation where facilitation and learning design roles are structured separately. For a dual role practitioner to be effective, they first need to be taught learning design principles and then continuously apply that knowledge to build up their skill level. Support and allocation of workload would need to be considered by an organisation if dual-role practitioners were to be introduced. An alternative approach could be to have dedicated learning designers who bring more specialist knowledge and experience working alongside experienced facilitators to ensure both facilitation and learning design principles are met. This process would mean both designer and facilitator are learning from each other and working to create a learning experience that meets the needs of ākonga.

CONCLUSION

A quality learning experience is engaging and inclusive, with content that is relevant and meaningful to ākonga. Being both a facilitator and a learning designer is possible, and can produce quality learning experiences, but it does require a good understanding of design principles and how to apply those to learning materials. When a dual practitioner goes on to facilitate the course they have designed, this investment deepens further. Teaching your own materials means seeing them through the eyes of ākonga in real time: you are uniquely positioned to care about whether they

truly work. Blind spots must be acknowledged and recognised by facilitators when designing learning materials and appropriate steps must be taken to mitigate these challenges. However, facilitators who find themselves in a dual role can, through their knowledge and experience, create high-quality learning materials grounded in learning design principles.

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