

Create thriving projects and teams that get essential work done.

knowledge transfer
strategic facilitation
consulting
training
project coaching
change management

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Slides and templates at
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Tales from a Cat Herder

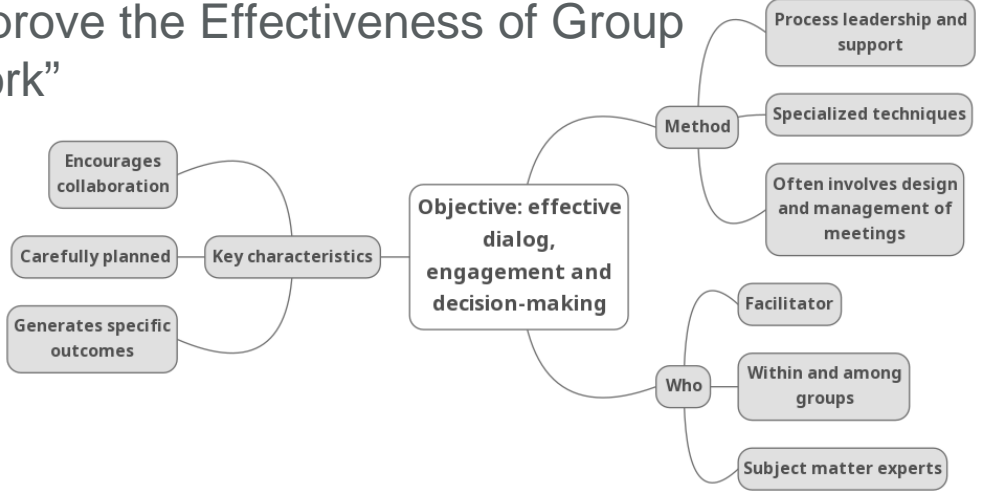
How to Facilitate Like a Master



ATD October 2024

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Facilitation is “Support Designed to Improve the Effectiveness of Group Work”



“The facilitator’s greatest contribution is to provide structure so that participants can focus on making the best decisions possible.” Ingrid Bens, Facilitation at a Glance, p. x

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But What Does a Facilitator *Do*?

A facilitator actively guides a group's process and behavior by doing these things:

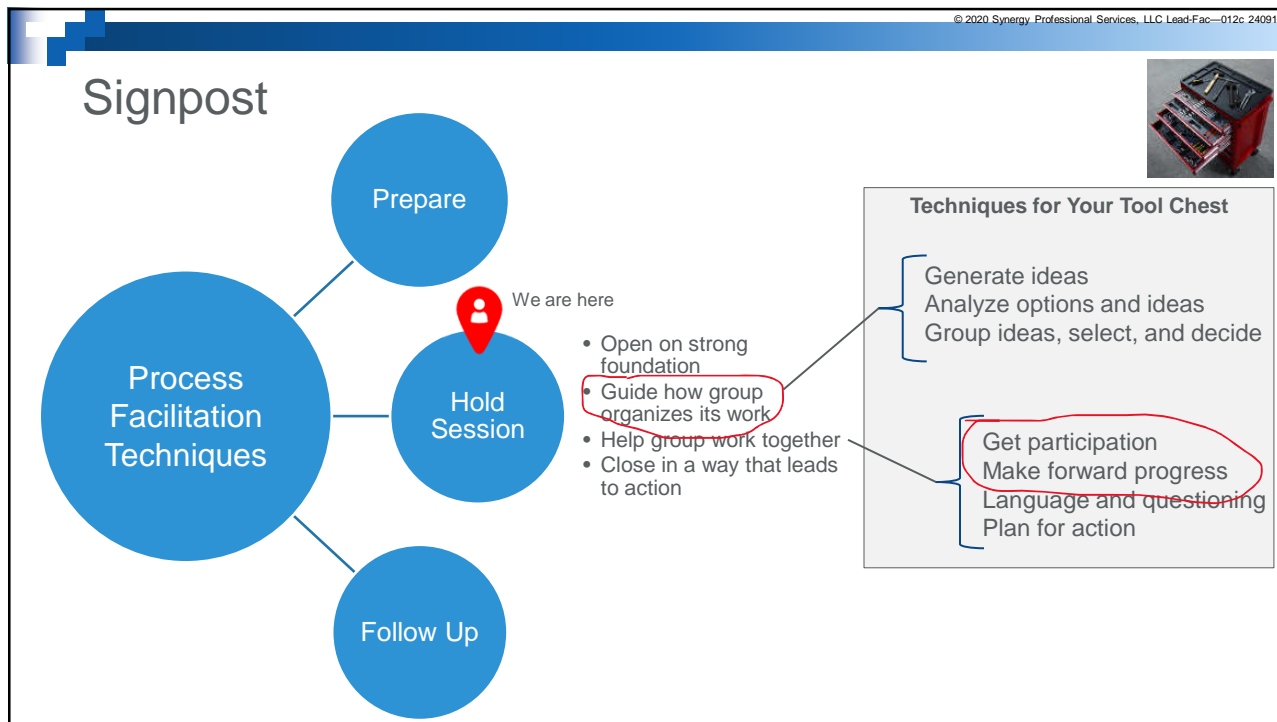
Architect (before)	<ol style="list-style-type: none">1. Get agreement on desired results2. Assess relevant context3. Design the sessions4. Prepare logistics
Pilot (during)	<ol style="list-style-type: none">5. Manage room and materials6. Clarify roles7. Manage pace8. Monitor progress9. Steer the course10. Ensure closure
Guide (always)	<ol style="list-style-type: none">11. Create trust and safe space12. Guide problem solving process13. Inject enthusiasm and energy

Chat 

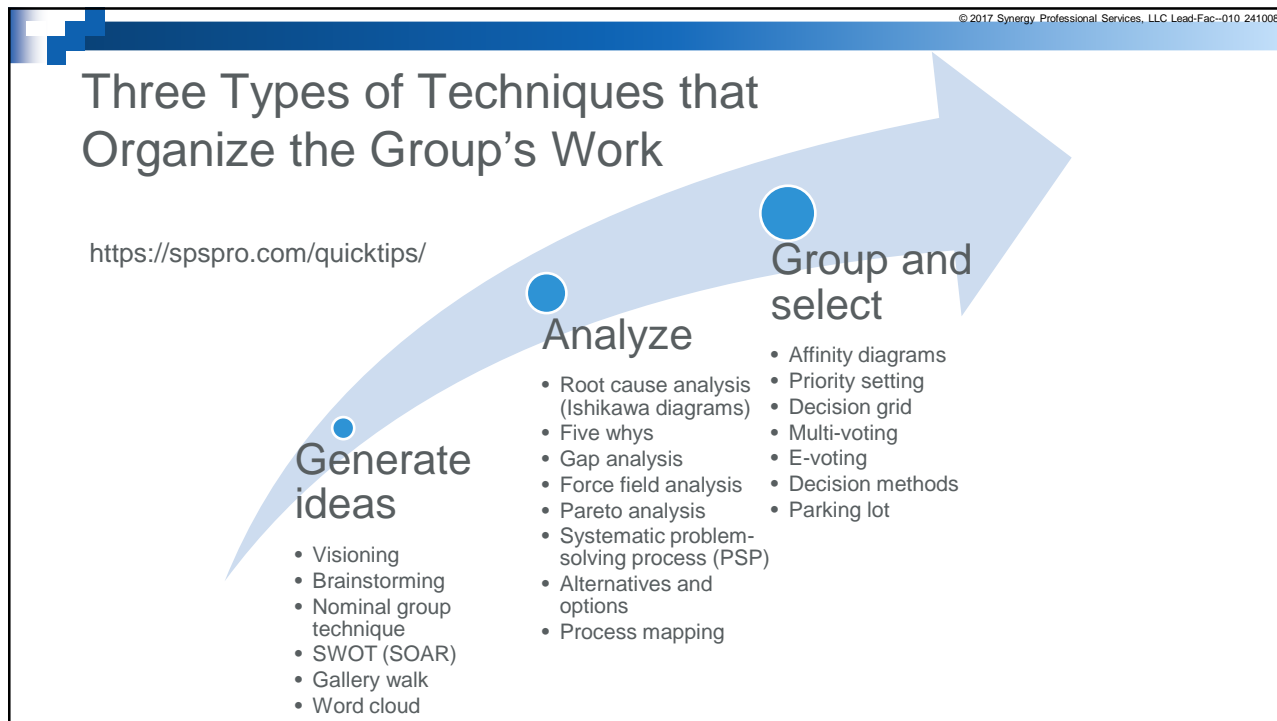
Which of these are most challenging for you? Most fun?

The three categories are from the International Institute for Facilitation and Change

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General Approaches That Increase Participation

1. Ensure topic clarity because obscurity reduces participation

2. Ensure clear norms for participation

3. Use techniques that involve all participants, such as brainstorming

4. Create buy-in

5. Use appropriate humor

6. Set up room to be physically comfortable and encourage easy interaction

- May be from individual, project, department, or organization
- Describe extent of organizational support
- If necessary, identify blockers

7. Encourage pre-meeting preparation

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High Participation Techniques

My Favorites

Structured brainstorming

Round robin or nominal group technique

Affinity diagramming

SWOT analysis

Gap analysis

Discussion partners with share-back session

Other Techniques

Tossed salad

Issues and answers

Talk circuit

Pass the envelope

Visioning

Appreciative inquiry

“Creating activity and buzz in the room brings people together.” Ingrid Bens, *Facilitation at a Glance*, p. 97

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Activity – Try Discussion Partners Technique

In small groups (6 minutes)

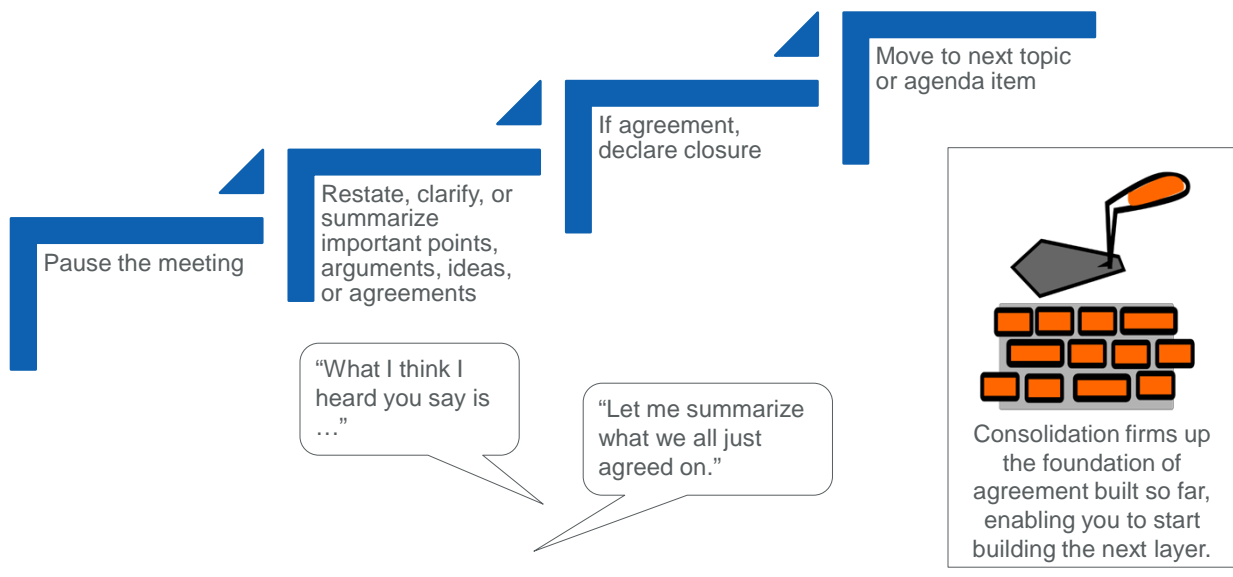
- Share tips or challenges in getting participation from a facilitated group
- As a group, agree on one method for improving participation that you will describe to the large group

Back in the large group (4 minutes)

- I will randomly call on several groups to summarize their work. (one minute or less per group)

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Technique to Move Forward: Consolidation



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Signpost

We are here

Prepare

Process Facilitation Techniques

Hold Session

Follow up

1. Agree

- agree with sponsors on general expectations (aka charter)

2. Assess

- gather and assess relevant info

3. Design

- formulate specific objectives
- design the process and tools
- get feedback

4. Final Prep

- create pre-work, agenda, facilitator's guide, and logistics

Careful design prepares you to improvise.

"The best-laid schemes of mice and men
Go often askew."
– Robert Burns, *To a Mouse*, 1785

Get ready for upcoming poll! Either use this QR code with your phone's camera or open a web browser to PollEv.com/jeffo410.

Do not register if prompted.

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Preparation: Assess

Types of Info to Gather

- About the participants
- About the problem to be solved
- About the organizational context

Methods of Gathering

- Individual interviews
- Group interviews
- Surveys
- Group observation

What to Assess

- Emotional climate
- Authority structures
- Preferred communication styles
- High-context vs. low-context (directness)
- Task vs. process orientation

Purpose: gather and assess relevant info; formulate specific objectives
Who with: facilitated group or team
Template: assessment

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Worksheet

Facilitation Assessment Template

Instructions

The purpose of the assessment template is to help the facilitator and participants to gather and assess relevant information that will affect the design of the facilitated session. Some questions are suitable for discussion directly by the participants, while the facilitator may wish to keep others private.

About the Participants

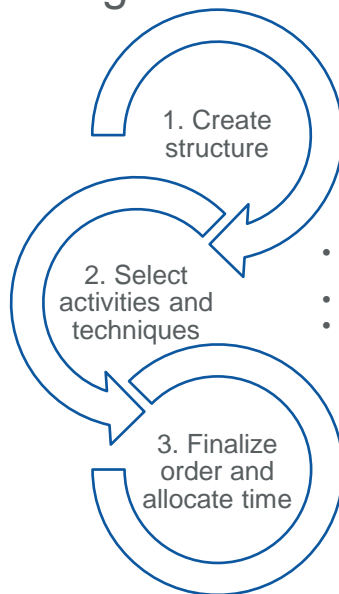
1. How well do they know each other?
2. What have they worked on together in the past and what were the dynamics of that working relationship (e.g. degree of conflict, teamwork, risk-taking, or

Handout packet page 3

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Preparation: Design

“Facilitators spend as much time creating their process notes for a meeting as they spend actually facilitating the dialog.” – Ingrid Bens, p. 218



“Lego approach”

- Assemble structure from building blocks
- Ensure building blocks complement each other to achieve meeting objectives

- Define activities and techniques to implement each building block
- All should support objectives of session
- All should consider context and behaviors from assessment


- Think through desired flow of session
- Design to manage energy levels from beginning to end
- “Goldilocks agenda” – not too full and not too sparse

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Example Building Blocks

Welcome and overview	Warm up or relationship building	Needs or situational assessment
Briefings or info sharing	Generating ideas and options	Analysis, planning, or problem solving
Selecting, grouping, or making a decision	Consolidating or summarizing results	Evaluation and reflection



- Web: PollEv.com/jeffo410
- Text: Send jeffo410 and your message to 37607

Skip registration!



In your experience, what are important assessment and design considerations when you are preparing to facilitate an important or difficult session?


Nobody has responded yet.
Hang tight! Responses are coming in.

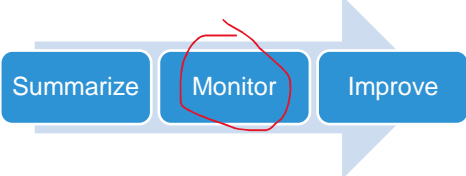
Start the presentation to see live content. For screen share software, share the entire screen. Get help at poller.com/app

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Signpost





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Use Action Items to Get Agreement on Next Steps

Issue and Action Item (AI) List

Project Name: Online for All			List owner: Jessica W.		
ID	Issue Description	Action and Status	Entry Date	Owner	Due Date
1	Department has decided that all fall MBA classes will be 100% virtual, so must replace face to face team exercises with something in cyberspace that is compatible with Zoom.	Find supplementary software that enables virtual, collaborative manipulation of forms, stickies, work breakdowns, and network diagrams. Status as of 6/30/20: Miro recommended by WU EDC, so prototyping virtual classroom. Next step is to demo to department head.	6/16/20	John S.	08/10/20
2					

Really important tips!

1. Ensure that each AI contains information on *what*, *who*, and *when*.
2. If you can't get a firm date for the *when*, ask for a "date for a date."
3. Capture action items and decisions in real time by writing on a whiteboard or flipchart. Take a photo at the end of the meeting.

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Monitor Short Term Action Items



Regularly check status of AI's (e.g. weekly update on AI's with upcoming target dates)



Post simple status visually and publicly

- Example: RYGC dashboard



Enable pressure and help from colleagues

- Visual methods create subtle pressure to act
- Consider scheduling a regular AI review and problem-solving meeting

In my experience, AI monitoring is most effective for AI's with time horizons of less than a month

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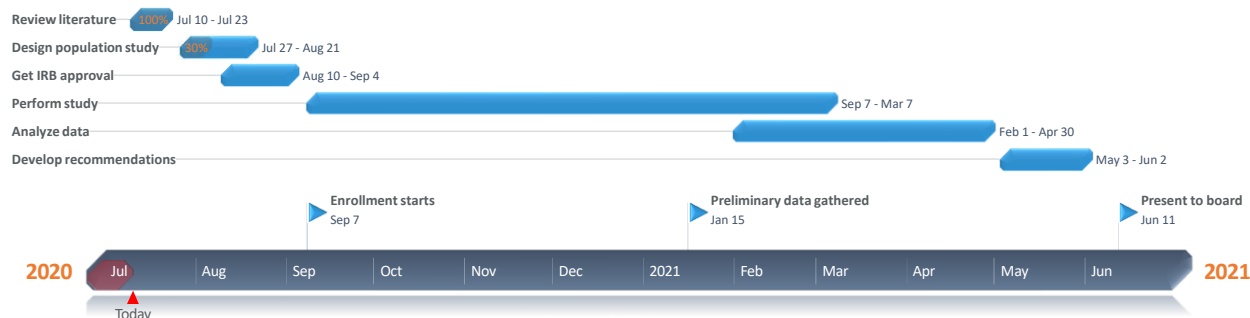
Use a Roadmap to Monitor Longer Term Action

Use visual roadmap

- Communicate and track action plans that have longer horizon
- A month to several years

Bar format is easy to understand

- Example uses Office Timeline plugin for PowerPoint
- Can also draw using Excel or Miro grid and shape tools



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Activity

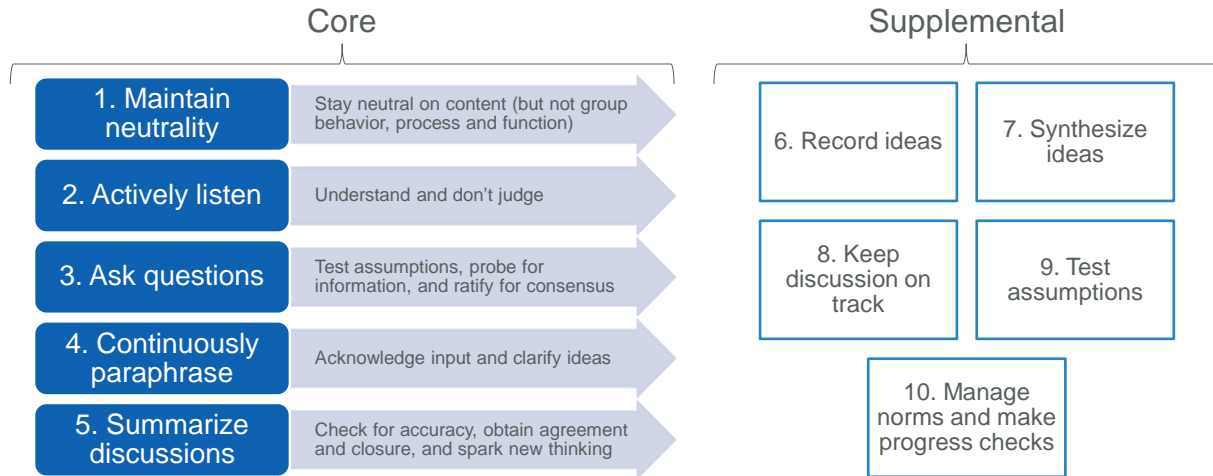
Place stickies on the Zoom whiteboard naming your favorite techniques to encourage action and follow-up.

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IAF's Process Facilitation Practices

Chat

Which of the ten practices are most important for the facilitation work you do?



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Resources



spspro.com/clients/tdcascadia



spspro.com/quicktips



International Association of Facilitators Methods database

www.iaf-world.org
www.sessionlab.com/library/iafmethods
 (partially free)



Bens, I. (2016) *Facilitation at a Glance! Fourth Edition: Your Pocket Guide to Facilitation*. Methuen, MA: GOAL/QPC.

I'm happy to talk: jeff@spspro.com

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