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Successful Facilitation

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Goal of this Session

- To discuss techniques to use when facilitating a meeting in order to have things run smoothly, gain desired outcomes, and encourage collaboration

Session Agenda

- Defining facilitation
- Reviewing the steps of the facilitation process, including proactive steps
- Strategies for knowing if the facilitation is succeeding

Opening Exercise

Based on your personal experience,
what makes a bad meeting?

What is facilitation?

- Facilitation is the process of helping a group reach its goals effectively and efficiently
- The goal of facilitation is to generate group action with a distinct purpose
- Every meeting is facilitated, whether or not this role has been explicitly assigned

The Scope of Facilitation

- Single meeting facilitation for a particular goal
- Facilitation of an ongoing group or initiative
 - This may include regular monthly meetings and separate subgroup meetings

The Task of a Facilitator

- Manage the process
- Make sure the group is reaching its goals
- Foster communication and collaboration among all participants and with the group's leader
- Provide and promote transparency in process and decisions

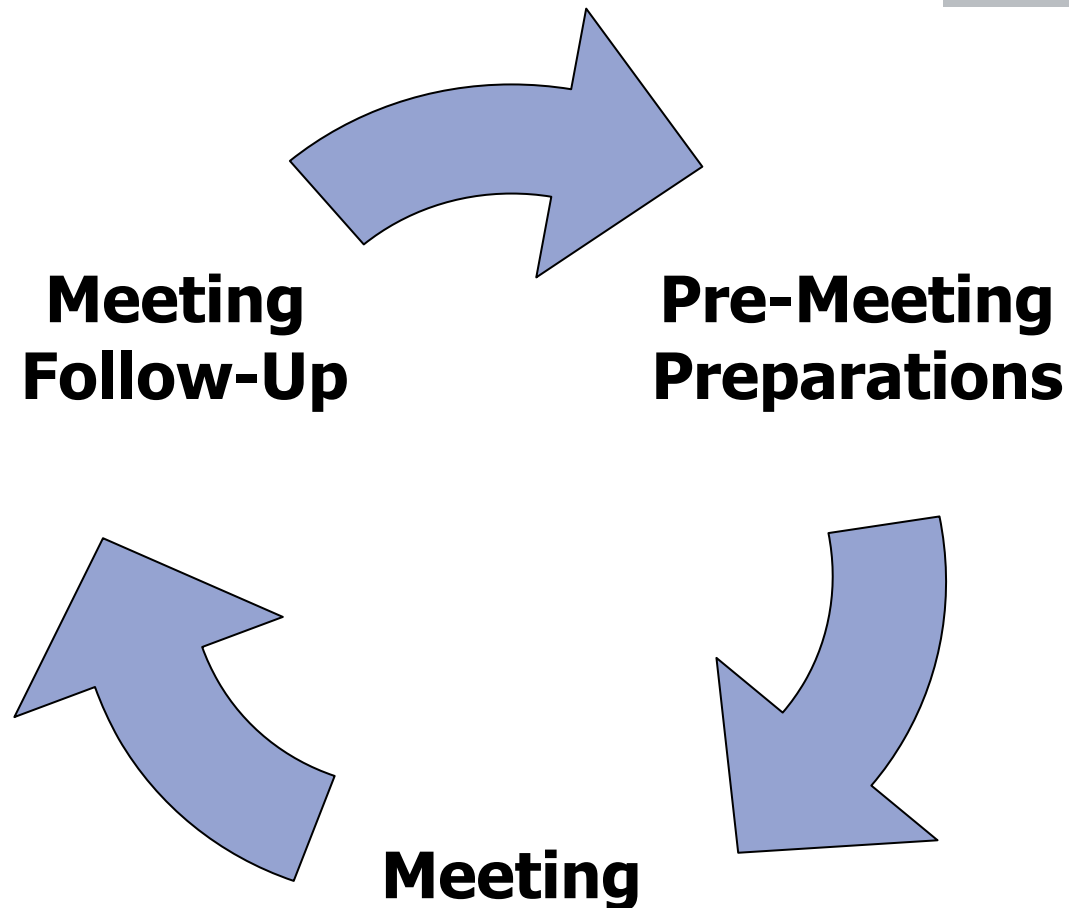
The Task of a Facilitator *(continued)*

- Instill a sense of teamwork in the group
- Stay neutral in group discussion
- Synthesize group ideas
- Above all, build and maintain the group's momentum

Clarifying Group Roles and Responsibilities

- A group's chairperson is its official leader and runs the meeting
- A group's facilitator manages participation and offers guidance on process
- A note-taker should be identified before each meeting
- All members are expected to contribute

The Meeting Facilitation Process



Assumptions

The following assumptions have been made:

- Group membership has already been established and all parties know of their responsibilities
- The facilitator is an external party, not the group leader or one of the other participants



Pre-Meeting Preparations and Considerations

Know Your Group

- Understand the content and context
 - Context will vary among the members of your group with respect to their positions and affiliations
 - Relevant content should be reflected in your facilitation process

Calling a Meeting

- Be sure your participants have a clear expectation of the meeting date, time, and location or call-in information
- Invite participants in writing

Value in Participating

Make sure your participants see value in each meeting by:

- Providing something constructive to do or discuss each meeting so participants leave feeling like the group has accomplished something
- Being clear about the goals of each meeting
- Presenting relevant information and facilitating relevant discussion

Designing an Agenda

- Work in cooperation with group leader(s) to devise agendas
- Each agenda should include:
 - Topics of discussion
 - A basic timetable for these topics
 - Who is leading each discussion item
- Include clear process notes in an annotated agenda for your own use

Additional Advance Materials

- Provide advance materials
 - Agenda and other necessary materials give your participants a background for meeting discussion
 - Provide at least two working days ahead of time, but one week or more is better
 - Provide all updated materials that have resulted from previous meetings



Holding the Meeting

Facilitating the Meeting

- Start on time
- Welcome participants
- In your first meeting, explain your role as facilitator, and have others with defined roles explain their positions
- Clarify the goals of the session, the agenda, and any advance materials

Facilitating the Meeting *(continued)*

- Follow the agenda, but be flexible when necessary to alter the order or extend an important discussion
- Avoid conflict and resolve issues through clarifying and problem-solving
 - Encourage respectful communication
 - Help members identify issues and solutions
 - Invite feedback
 - Share responsibilities
 - Stay neutral

Facilitating the Meeting *(continued)*

- Check the progress of the meeting periodically
 - As each agenda item is completed, review key points and next steps
- Encourage participation
 - Deal with a “discussion dominator” by soliciting input from others, such as through a round-robin approach
 - Split off into small groups to brainstorm and report back to the larger group

Facilitating the Meeting *(continued)*

- Establish clear next steps and assignments
 - Define what needs to be done, when, and by whom
- Meeting closing
 - Review next steps and assignments
 - Discuss ideas for the next agenda
 - Announce when the next meeting will be held



After the Meeting

Meeting Follow-Up

- Work in cooperation with group leader(s) to devise future meeting agendas
- Provide participants with detailed, bulleted meeting minutes that include assignments
- Send reminders to those who were given tasks a week before the next meeting

Tools for Effective Long-Term Facilitation

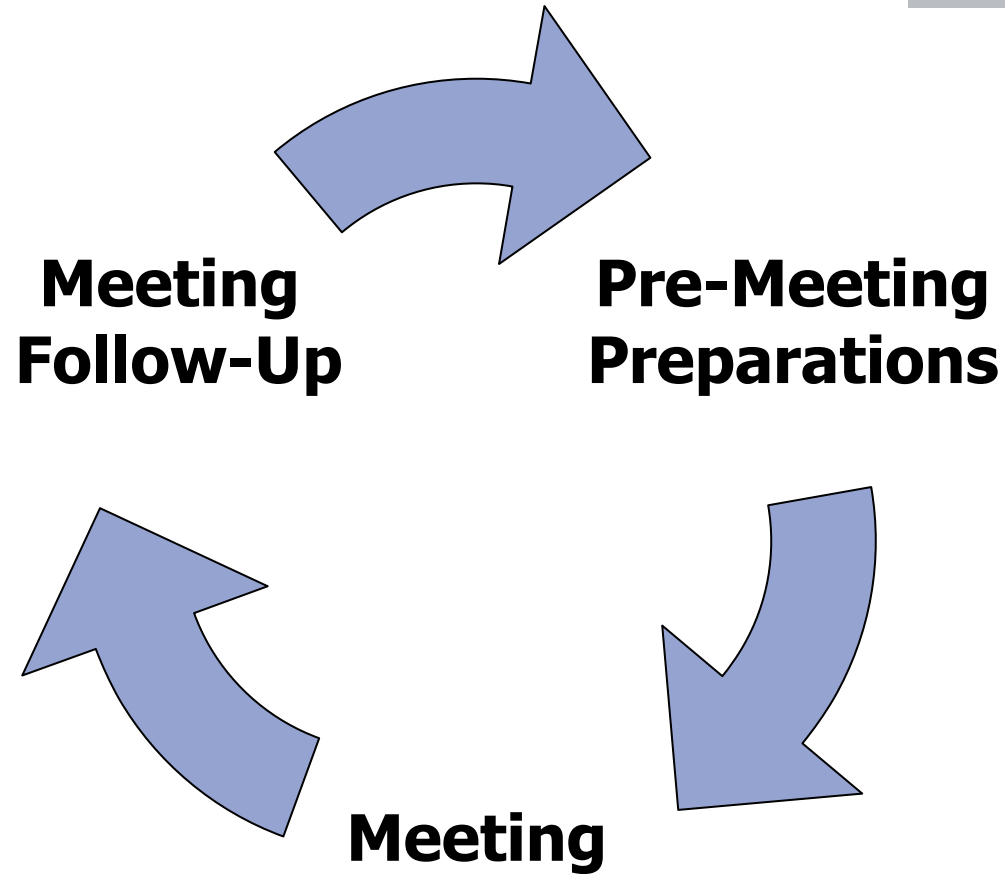
■ Charters

- Include the group's mission, goals, leadership structure, membership responsibilities, procedures, meeting frequency, etc.

■ Action Plans

- Include specific actions, timelines for those actions, who is responsible, and what the short- and long-term goals are of each of these action steps

Review: Meeting Facilitation Process



Exercise: How do you know your group is successful?

Split into groups of four. In your group, Discuss indicators of a successful facilitation process.

- How best can I measure the progress of my group?
- How best can I measure my effectiveness as a facilitator?
- What questions might I ask of my participants to gauge this, and in what format might I pose the questions?

Exercise: How do you know your group is successful? *(continued)*

- You will know your group is successful if:
 - Members continue to attend meetings
 - Participants are engaged in discussion
 - Progress is being made toward the group's goals on the timeline established
 - You receive positive feedback from group members

Evaluating Success

- Regularly check-in with group participants formally using evaluation forms
 - Design your evaluation form so that the data gathered can be easily interpreted
 - Use a Likert scale system
 - Include few open-ended questions
 - Record and calculate your data in spreadsheets for analysis

Evaluating Success *(continued)*

- A Likert scale is a rating scale that measures participant attitudes. It quantifies what would otherwise be subjective information and makes it comparable across the group.

Evaluating Success *(continued)*

Example question:

- Using the scale provided, please rate your agreement with each of the following statements for the meeting overall.

(Please circle one number for each question.)

	Strongly Disagree			Strongly Agree	
a. This meeting served to solidify the group's role in the achieving the goals of its mission.	1	2	3	4	5
b. Overall, I found this meeting worthwhile to attend.	1	2	3	4	5
c. The facility was appropriate for the meeting.	1	2	3	4	5
d. The vision for the future of this group is clear to me.	1	2	3	4	5
e. I had sufficient opportunity to contribute my ideas.	1	2	3	4	5

Evaluating Success *(continued)*

- Discuss process changes and methods of improvement with group leadership
- Make improvements in your facilitation based on these evaluations

Session Overview

- Defined facilitation and the role of the facilitator
- Discussed how to facilitate the meeting process, from pre-meeting to post-meeting stages
- Discussed how to determine if the facilitation is working

Please remember to complete the session evaluation form!



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Successful Facilitation Session

Affordable Housing Conference, April 2010

Additional Resources

Organizations:

The International Association of Facilitation: <www.iaf-world.org>

Meeting Facilitators International: <www.facilitators.com>

Publications:

Bens, Ingrid. *Facilitating with Ease!: Core Skills for Facilitators, Team Leaders, and Members, Managers, Consultants, and Trainers*, New and Revised. San Francisco, CA: Jossey-Bass, A Wiley Imprint, 2005.

The Human Leadership and Development Division of the American Society for Quality, The Association for Quality and Participation, and the International Association of Facilitators, *Basic Facilitation Skills*, 2002.