

## **FACILITATION**

### **I. Introduction (10min)**

- Who has run a meeting?
- Who has been in a meeting that was unproductive or went on way too long?
- What were some of the challenges you've faced as a facilitator, or that often come up in your group's meetings?

*PASS AROUND HALF SHEETS, EVERYONE WRITES AND THEN I GROUP THEM UP ON THE WALL.*

### **II. How to Set up a Good meeting (10min)**

- a. Have a clear purpose
  - i. Know what you want out of the meeting, set clear goals
  - ii. Don't have a meeting just to meet. Is it something that can be done over email, with a phone call?
    1. Reasons for a good meeting:
      - a. Decision needs to be made by the group
      - b. Delegate tasks
      - c. Motivate
      - d. Plan the next steps of a campaign
- b. Know what you are getting into:
  - i. Do an agenda
  - ii. Review agenda and goals with the core group ahead of time
  - iii. Know "the pulse" of the group before you walk into the meeting
- c. Involve as many people as possible in planning and running the meeting
  - i. Keep the group from getting "cliquey"
  - ii. Engage people in the agenda for the meeting
  - iii. Assign roles out before the meeting

### **III. Overview (5 min)**

- a. Definition:
  - i. a facilitator is someone who uses knowledge of group processes to formulate and deliver the needed structure for meeting interactions to be effective.
  - ii. A facilitator is someone who helps a group of people understand their common objectives and assists them to plan to achieve them without taking a particular position in the discussion. The facilitator will try to assist the group in achieving a consensus on any disagreements that preexist or emerge in the meeting so that it has a strong basis for future action.
- b. Goals of facilitation
  - i. To keep the meeting focused
  - ii. To keep the meeting on track, on time
  - iii. To ensure decision-making is inclusive, to encourage participation
  - iv. To end the meeting with the best possible product

#### IV. Types of Interventions

- a. Re-structure process
- b. Re-focus content
- c. Shift energy

V. Discussion of Common Situations that you run into with these personalities. This section should be all discussion. Present the Situation and What's Happening, and use the notes on Facilitative Intervention to help guide the discussion about possible solutions. (15 min. 5 min/situation)

Situation	What's happening	Facilitative Intervention
Side Conversations	A member of the group is having side conversations with other participants during the beginning of a consultation.	1. A friendly comment – “Can we all agree to have just one conversation at a time
		2. Direct the Comment – make eye contact with the person, say their name and restate, “Jack, remember we agreed one conversation at a time.”
		3. Personalize it – “Jack do you have a clarifying question for Samantha? Or “Jack I see you have something to contribute. When Julie has finished we’ll hear you.”
		4. Make a direct request: “Jack would you please hold your comments until Julie has finished.”
	If Jack is the only one interrupting or having side conversations	Talk to Jack during a break or after the meeting. Might also bring it up with the group leader when you are debriefing later.
	If there are multiple people interrupting or having side conversations.	Put the process on hold and remind the group that they gave you permission to facilitate and keep the group focused. Do we need to change the agenda? Take a quick Break? Put a topic in the parking lot? Or Move on?
Staying on Time	The group has a lot to cover in their agenda, but they seem to go down rabbit holes and may veer off into other topics	1. Invoke your permission to facilitate. Suggest the use of a parking lot to capture items that need to be pursued, but are not the focal points for this meeting.
		2. Specifically refocus on the particular topic/agenda item: “I’d like to remind you that we’re just discussing the influences on the decision maker now. Next we will be

		moving onto tactics and then the plan.
	The discussion has continued for some time and you are running out of time on an item.	3. Attempt closure of item. “We have 10 minutes left on this item if we want to stay on schedule. It sounds like the group is saying X. Jack do you agree? Julie? Etc...”
	The item is truly important and just wasn’t given sufficient time for the necessary discussion and action.	4. Give activists a choice on how they spend their meeting time. “Is this item more important than the rest of the agenda? When will we address the rest?” Note – the answer should rarely be to just keep going until all items are covered.
Never-Ending Discussion	Information Barrier: Sometimes a discussion will not come to closure because of the information is insufficient, inaccurate, or unreliable. Sometimes a topic leads to significant emotional response.	1. The group needs to agree that either the meeting can or cannot go on without perfect information. If you think the meeting should go on, then you should make your case and enlist allies. Be open to changing the agenda.
	Personal Agenda or Monopolizer: Whenever a topic comes up, the same person begins to drive home the same old point. You can often gage the relevance of their story by reading the faces of other activists.	1. Gentle Interruption. Once you’ve determined that the person is in story-mode, and what’s being said does not seem to contribute to the item under discussion, gently interrupt to ask, “Don, excuse my interruption but I’m not sure how this fits into our topic. Can you clarify?”
		2. Direct the Inquiry: Make eye contact with Don and ask, “This sounds like familiar turf, is this a reoccurring theme?” Make eye contact with the rest of the participants. Usually Don will acknowledge the theme. Acknowledge him, ask what key piece of the discussion he would like captured, and then move on.
		3. Personalize the request: “Don we agreed that this item would remain in the parking lot; has anything changed?”
	It is unlikely that the	4. Firmly restate your request to move on.

	person will continue raising the issue. In the event that he does...	
	If an individual cannot let go...	5. Talk to Don privately at a break. Give feedback about the impact he is having on the rest of the group and the consultation. Ask for his help in keeping the session moving forward.