FACILITATION
A HANDOUT

A FACILITATOR'S RESPONSIBILITIES

A facilitator:
• decides what information is explored, how it is explored, and how decisions are made.
• helps everyone in the group reach the best outcome possible in the time available.
• maintains a positive and constructive meeting environment.

A facilitator does not:
• make decisions for the group.
• make suggestions or opinions about the meeting's content. For instance, the facilitator does not say respond directly to a participant with comments like "I disagree with your proposal to host a workshop next week."

If you have a lot to say at a meeting don't facilitate. And if you really need to speak then make it clear that you're speaking as a member of the group and not as a facilitator.
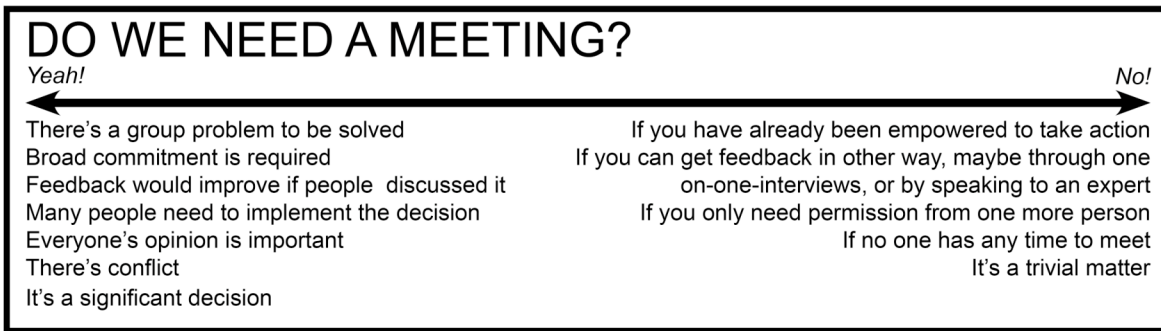
Well-run meetings depend upon many things, including:

• a facilitator with good social and emotional intelligence
• an experienced facilitator
• a facilitator who understands the group they're working with. The facilitator should like things like a group's culture, meeting norms, and decision-making process, as well as the personalities of the members (who's influential, who speaks out of turn, etc).
• participants who understand the meeting's goals and facilitation and help the facilitator drive the process forward
• participants who have a clear understanding of their group's process, culture, and norms – which usually means the group has worked together for a while.

In other words, the facilitator is not solely responsible for the success or failure of a meeting.

ACTIONS TO TAKE BEFORE THE MEETING

1. Decide if you need one.

DO WE NEED A MEETING?

Yeah! ←——————————————————————————————→ *No!*

There's a group problem to be solved	If you have already been empowered to take action
Broad commitment is required	If you can get feedback in other way, maybe through one
Feedback would improve if people discussed it	on-one-interviews, or by speaking to an expert
Many people need to implement the decision	If you only need permission from one more person
Everyone's opinion is important	If no one has any time to meet
There's conflict	It's a trivial matter
It's a significant decision	

2. Identify and choose to abide by the group's decision-making structure.

Typical decision making structures used by activists and advocacy groups include:
• Consensus (everyone agrees, or everyone agrees not to oppose a decision)
• Modified consensus (strive for consensus then drop down to 80% or 90% if a decision must be made, maybe bcause there's a time crunch)
• 80% voting majority
• 50% majority
• 1 or 2 people hold the power. This is fairly typical in hierarchical decision-making environments, such as most large non-profit organization. As a facilitator, your job is to make this power clear, and structure the meeting accordingly.

Not only do you need to think through how a decision is made, but you also need to identify who (or what group or committee) needs to make that decision, and when.

There's two helpful tools that you can use in this situation.   First, you can try and imagine the group' structure in order to determine what committee, sub-group, or department is responsible for dealing with that topic. A visual diagram can also help you determine what other groups or committees might care, influence, or be influenced by this matter.   A lot of advocacy groups set up sub-committees to deal with specific campaigns, projects, or ongoing tasks, such as communications. Big picture decisions – such as yearly budgeting and reviewing the organization's mission - are usually made by a steering committee or board.

Here's a sample organizational diagram of a group we'll call the Center for Leadership. Check it out online at: http://www.toolsforchange.net/wp-content/uploads/2011/12/Sample-organization-unamed.indd_1.pdf

By looking at this diagram you can tell that a conversation about short-term financial projects (such as organizing the yearly Christmas fundraiser) will need to involve the fundraising working group.

Another way of looking at this matter is to use the R.A.C.I. tool which stands for:
• Responsible: person who performs an activity or does the work.
• Accountable: person who is ultimately accountable and has that Yes/No/Veto.
• Consulted: person that needs to feedback and contribute to the activity.
• Informed: person that needs to know of the decision or action.

You usually need "Responsible" and "Accountable" people at meetings, "Consulted" people at some meetings, and "Informed" people at few meetings. Remember that you can also disseminate information or secure feedback through one-on-one conversations or email.

3.   Know and try to respect the group's culture and norms around discussing issues and making decisions. There's more to decision-making than just knowing a group's official decision-making process.   As a facilitator it's your job to observe meetings carefully and ask people questions in order to help them identify these rarely-talked-about practices.

For instance, some groups have an elaborate hand signalling system for making decisions via consensus, including twinkling fingers in the air (I'm into it), forming a cross with their forearms (I'm really not into it), or using the "fist to five" process to register their degree of support for a proposal.   Other groups prefer to informally discuss a topic until everyone feels comfortable with the proposal.

Some groups like to make decisions in advance. For instance, many community and labour groups make decisions by having staff interview representatives from key groups and craft proposals based upon these interviews. The proposal is usually developed, adapted, and approved – at least informally – prior to the meeting. Approval of the decision at the meeting is often just a formality.   Many direct action organizing groups would see this process as undemocratic, preferring for decisions to be introduced, debated and decided in a face-to-face setting.

Some groups like to have agenda items introduced and approved by the group's co-chairs. Other groups are comfortable with new agenda items being introduced at the start of the meeting.

Some groups have a culture of loose facilitation, where the facilitator rarely intervenes and allows for members to stray a little track. Other groups have a culture of tight facilitation, where the facilitator might keep rigid track of who is speaking and how long they can speak for, and only one proposal is discussed at a time.

4. BUILD THE AGENDA.

It is often wise to talk to members beforehand and get them to identify agenda items.

For controversial decisions or important meetings – such as yearly strategic planning retreats – it helps to talk to people in advance in order to hear what they have to say about specific agenda topics so you understand the key points of tension or disagreement.

Send your proposed agenda around to all members prior to the meeting so they can give feedback.

Adjust the agenda based on the feedback you receive.

Don't put too many topics into an agenda; topics usually take longer than you think, and everyone's happy when you finish early.

Prepare people to speak about their topic. Ask them to do their research, prepare for their presentation (if they're giving one), bring handouts and be ready to answer questions, if

necessary. It sucks to have a decision delayed because people didn't have the information they needed to make a decision.

Do reminder calls and emails. It's wise to do a final reminder email the day before the meeting.

Organize logistics. Choose a quiet room (bars and cafes are not good places for meetings). Collect, order and confirm any AV equipment, laptops, connector cords, PowerPoint presentations (save in different formats and put on a USB stick) extension cords, markers, whiteboards, and flip chart paper.

Review who is coming to the meeting.   Are there disrupters? Maybe you want to have a back up facilitator to prepare for this.   You could also make sure to set ground rules, and two of those ground rules could be 1) no interrupting others and 2) make sure everyone has a chance to voice their opinion. You could even have a one-on-one conversation with the problem person so you know their concerns and they know their behaviour is detrimental to the productivity of the meeting.

Come early – like 45 minutes early - to make sure all the technical equipment works, the chairs and tables are in the right place, and you have all the materials you need.

A typical agenda consists of:

• Introductions

• A review of the agenda

• Assign roles (e.g., note taker, "vibes" watcher, stack)

• Establish ground rules

• One or two non-controversial quick and easy topics.

• Difficult agenda topics, starting with the most important so you don't run of out of time before addressing it and you discuss it while energy in the room is still high.

• Review decisions and next steps

• Set next meeting.

GROUND RULES

Ground rules are useful for long meetings, or meetings where there is no clear established meeting culture, such as in situations where people don't know each other or haven't worked together before.

If you're going to take the time to establish ground rules then make sure to enforce them. For intance, if someone is interrupting someone you could say, "we agreed we wouldn't interrupt each other. Remember we wrote that down? (Point to ground rules).   Can we all try and stick to these rules please?"

Some ground rules include:
• Step up / step back. (people who talk a lot check yourself, people who don't speak up if you have something to say)
• Stretch yourself (try it on, take risks, etc.)
• Mine for understanding (ask questions if you don't understand or agree with someone)
• We are all better than the worst things we say or do (it is okay to make mistakes, just be ready to hear about it and learn from it)
• No interrupting
• Start and end on time
• Respect the opinions of others (it doesn't mean you have to agree with them, but it does help if you still behave in a respectful manner even if you don't see eye-to-eye.)
• Listen to your body (take breaks when you need them; you don't have to ask)
• Expect unfinished business (we won't cover everything and we can't answer all questions completely)
• Do your part to make this meeting successful for you and others.

INTRODUCTIONS AND ICE-BREAKERS.

There's countless introductions and ice-breakers out there.

Some meetings (such as formal meetings with older professionals) necessitate more traditional introductions, where people don't leave their seats, and questions that are asked are explicitly geared to soliciting practical information related to the purpose of the meeting. Here's a few:

- a go around, where people one-at-a-time say their name, what group they're with, and their response to a question, such as "what do you want to get out of this meeting?"   Other questions include: "why did you come?", "favorite colour?" etc. The facilitator decides what information each person shares. If often helps for the facilitator to initiate this go around because then you can model what you want other people to share.   This introduction works well in small groups of ten people or less.

- small groups with some kind of report back. The facilitator asks people to break into groups or two (or three) and each spend one minute talking about themselves to the other people in their small group. Typically facilitators will also suggest questions that each person should answer, such as "what is your name?", "why did you come?" etc.   A variation of this is to have one small group member interview the other member.

Then there's a wide variety of more creative introductions that can yield additional purposes, such as waking people up and creating a tone of fun and openess.

Here's an example:

Name Game Shuffle
Participants walk around the room. The facilitator explains that she/he is going to call out a category and that when she does the group is going to get into groups based on that category. For instance, if the category is footwear then folks who are wearing socks might choose to clump together, and folks in bare feet might choose to clump together. This activity is done silently. Once people are in their groups the facilitator asks people to learn each other's names. The facilitator calls out a series of categories. Good categories include "hair style," "height," "what you are wearing on your feet... bottoms, tops, jewelry, etc." and "eye color". After a few rounds the facilitator asks everyone to become a big circle again. The facilitator

asks people to introduce themselves to people whose names they don't know yet. The facilitator then asks people to create a big circle again and asks if anyone feels they can name everyone in the group. Someone steps forward. The facilitator asks the rest of the group to "whisper" the name of any person if the person who is trying to remember everyone's name forgets someone.

MOVING THROUGH EACH AGENDA TOPIC.

It's useful to have clarity on what we need to achieve with each agenda topic. Is it an update, a decision, a problem-solving effort, a process for securing buy in? It's often useful to state this purpose out loud so the participants know the goal of this topic as well.

Then it's a matter of choosing what facilitation tool you think will help move the group forward.

Here are some common tools. Facilitators often start with using tools that open up the topic, then move to tools that allow for debate, discussion and assessment, and finally (if a decision is required) close with tools that help participants choose among options.

Check out this diagram to see where these tools are frequently used.
http://www.jessicabell.org/wp-content/uploads/2011/12/Meeting-structure-diagram1.pdf

Tool	What a facilitator could say	Additional notes
Updates/presentation	"Okay, we have someone here is going to do a five minute presentation about last week's board meeting. We'll take questions at the end."	Make sure presenters have prepared.
Clarifying questions	"Thanks for the presentation. Does anyone have some clarifying questions? Is there anything people don't understand?"	People might jump ahead and want to debate the content. It's useful to say something like "Let's hold off on opinions for now. We'll get to that shortly. Let's just make sure everyone fully understands the presentation first."
Q&A and feedback	"Anyone have feedback?" "Let's do a Q&A for 10 minutes. I'll keep stack. If you have a question try and catch my eye and I'll put you on the list. I'll be looking for you as well."	It's wise to set a timelimit for Q&A and feedback. If you're in a situation where the people giving the presentation are the decision-makers and are making the decision in another meeting then it can be useful to limit the amount of direct response the presenters can give to other participants. They'll get to justify their decision at a later date; what's most important is that they hear from everyone in the room.
Brainstorm	"Let's do a brainstorm. I'm going to write down every idea any of you have on this paper. Now remember, no idea is a bad idea. We're not going to spend our time critiquing	It's a big meeting ask someone to scribe on the flip chart paper so you can spend your time facilitating.

There is always a tendency for people to |

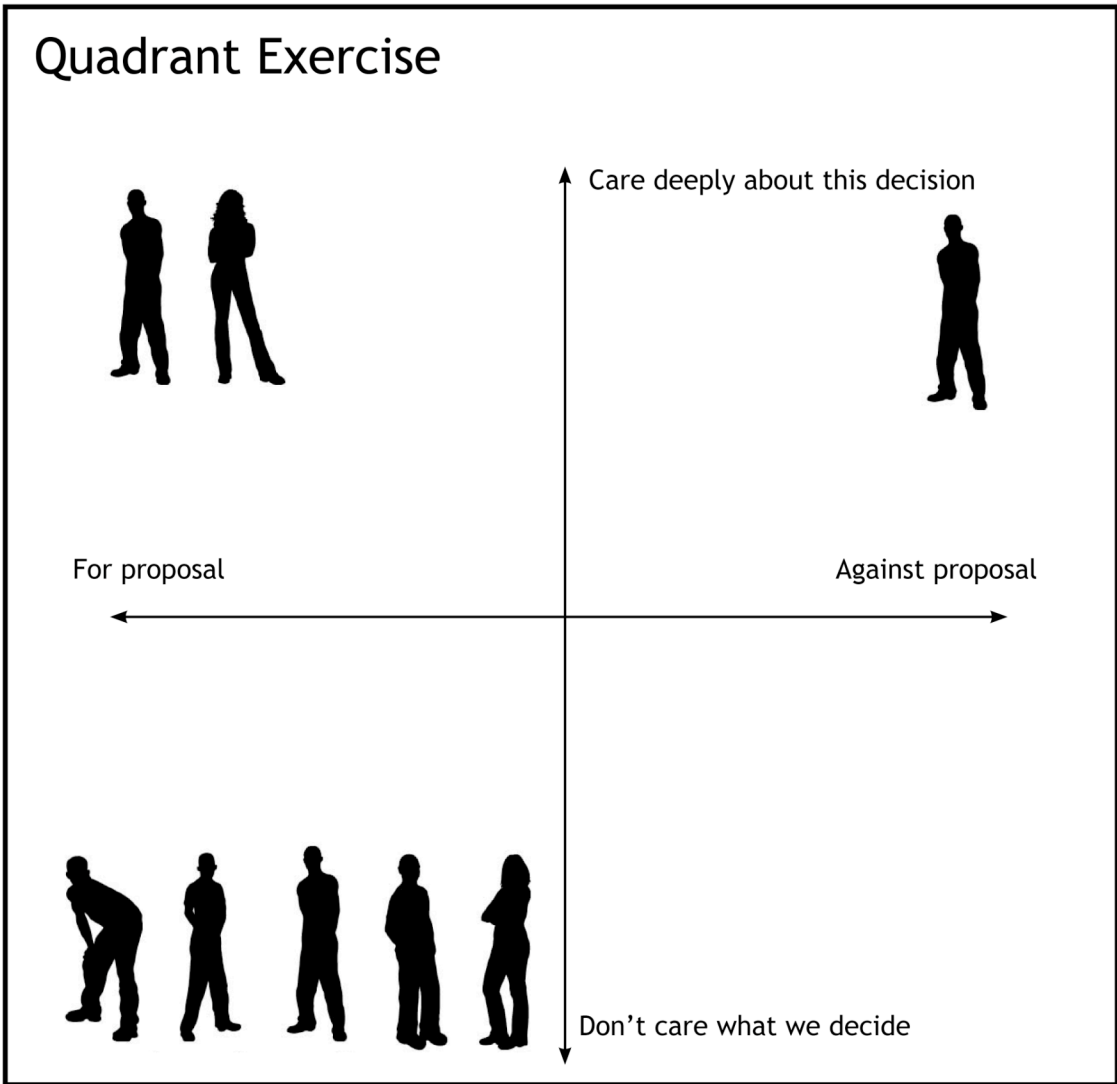|		
	these ideas. We'll do that later. So if you have a critique don't forget it; write it down or something and you can speak to it in about 20 minutes or so."	jump ahead and start criticizing the ideas written down. Ask them to hold their thoughts. If you have a big group or a talkative group it's sometimes useful to have groups tackle the problem in small groups of three or four. Have these small groups generate a list and then each group can take turns deciding and then sharing their top two (or whatever) favourites.
Synthesizing	"It seems like these two ideas are very similar. Pat and Katelyn… you wrote these ideas down: are you two okay with us merging these ideas? Is everyone else okay with that?"	You can amalgamate ideas that are similar. It's wise to secure permission from the people who suggested them. If there's a lot of ideas then you can call a 15 minute break, and then maybe one or two other participants can amalgamate similar ideas. Another option is to take advantage of the written word, and have people (or small groups) write down their idea on a sticky note and place it on a wall. You can encourage people to stick their notes next to ideas that are similar to their own.
Open discussion	"Let's talk about this topic for 20 minutes, and then we'll see where we're at." "I've been listening to the conversation and I sense that most of you feel comfortable with the proposal that we host a house party fundraising event in November. Would that be an accurate assessment?" "It seems like we haven't reached consensus yet but I get the impression we can if we talk about this topic for another 20 minutes or so; how about we do that and then we can re-assess our progress." "I sense that we feel okay with a tentative proposal of organizing a rally at Queens Park, but this proposal is contingent upon	This is the most common way groups debate, assess and evaluate options. There are many ways the facilitator can ride through this process. One thing you should decide is the extent to which you want to intervene in the conversation. Your level of intervention is affected by your own personal preference, as well as what the group needs and is accustomed to. Generally, less experienced groups need heavier facilitation than more experienced groups. Common activities conducted by a facilitator at this point include: - silently observing the conversation; - reminding people to stay on topic (if they sway); - keeping track of what proposals are in circulation and people's concerns with each; - keeping track of time; - asking quiet people to speak up;

	answering these three questions. Would that be a reasonable summary?" "It seems like we've heard a few people talk about this topic but we haven't heard at all from others, like you Max and you Vrinda. How about we do a go-around so we can hear what everyone has to say about this topic."	- doing a go-around so everyone can share their viewpoint; - keeping stack; - offering a proposal that you think is popular among the group (it is not your job to suggest new proposals but rather identify the ones that seem to be resonating, and it's always best to wait awhile before attemping to summarize the opinion of the group); - encourage other people to identify proposals they think have resonance.
Small groups	"How about we break out into groups of four or so and decide which of these ideas is best for us?" "How about we break into groups and have each group tackle a different matter. You can self-select which group you want to be in. We'll have that corner of the room identify our next fundraising event; that corner talk about membership strategies we should try; and that corner identify who and how we can recruit to join our board. You've got half an hour. Please have someone ready to do a report back." "It seems like we only have two people interested in the membership strategies conversation. Is there anyone who'd like to join this group?" "Okay, let's here each group give a report back. Can you limit your report back to two or so minutes, and then we'll take clarifying questions and feedback."	Breaking people into small groups of three to six people can be a good strategy when: - there's a lot of ground to cover; - there's a lot of contention and discussion; - there is more than 10 people in the meeting; - some people care a lot more about some topics than other people; - specific proposals need to be developed. You might find some resistance because some groups are not accustomed to this tool. It's useful to explain why it's valuable, and to also emphasize that no decisions will be made in the small group. You'll get to hear what they come up with, give your opinion, and (if that's the process this group uses) likely vote on their proposal. As a facilitator, it's useful to rove around and check to see how each group is progressing on their task. You don't have to interrupt, you can just observe. Group members usually know you're there and they'll ask questions if they need to. It's very important that you give clear instructions to groups and set a time limit. It's wise to write this objective down so everyone is clear on the purpose. Having each group answer once question or address one problem is usually sufficient.

		Diving people into small groups can be tricky. If this is a meeting it's usually best to not intervene too much and instead choose a process that allows for people to self-select.
		Asking people to number off (say from 1 to 4) and group by their number is generally too controlling (although it's a possibility if everyone if addressing the same question.)
		One option is to have people physically move into the group they want to be in and then ask for volunteers to move into groups that are under-represented.
		If no one wants to join then you might be receiving some valuable information. Perhaps the group is not actually interested in that issue? You could suggest for this topic or group to be disbanded.
		Another consideration is asking that people who have strong opinions on a particular topic to join the same group so they can identify solutions that meet their respective interests.
Gallery Walk	"Okay, so all the groups have written their proposals up. How about we put all these flip charts on one wall. Let's all spend a few minutes looking at what people have written. You can ask questions and discuss what you see on the wall. I also have sticky notes here. If you have a comment, question, or concern to add then please write on a sticky note and place the note on the flip chart paper."	A gallery walk can be an extremely efficient way to gather information.

You need to encourage neat writing, both on the sticky notes and on the flip chart paper. |
| Debate | "We're going to hear Jamie give a three minute presentation about why we should launch a campaign to improve the bus system in Scarborough. Then we're going to hear a three minute presentation from Shar about why we should campaign on expanding subways. | Debates are a highly directed way of facilitating a meeting. It can be useful to encourage the presenters to reference criteria that the group has collectively agreed is important to the outcome. The presenters can reference that criteria when they give their speeches. Debates can be useful if you need to identify a |

	Then they get one minute each to rebut the other person's arguments. And then we'll open it up to Q&A from you all."	"champion" in the group who is willing to make this idea happen if the group accepts it.
Proposal development	"We've been talking about this for about 20 minutes now. I sense we're close to reaching a decision. Can I test this proposal out. I think it covers what I'm hearing. We organize a town hall meeting in March and we invite all the candidates." "Can we move the conversation to identifying some proposals here. Let's put away our questions or criticisms and focus on solutions." "We've been talking about this for 10 minutes. We are running out of time. Let's see where we're at. It seems like we have two proposals on the table. Can we have two people summarize them please." "Can we group some of these ideas into a proposal?"	The proposal development stage can also be characterized as the later stages of discussion, which is a tool identified earlier. Proposal development is often where facilitation gets hard. And sometimes there's no clean or neat way to navigate through this process. At the core of it, either you or someone else will start to suggest proposals to move forward into the decision making phases. As a facilitator it's not wise to suggest new topics, but in many meetings it is seen as your responsibility to summarize what you think is popular and ask the group if this is a proposal they think reflects their viewpoints. Participants with experience in meeting culture will sometimes take on this responsibility so you don't have to. One of the bigger problems you'll face here is that multiple proposals are being presented. You can either talk about one at a time, see if you can merge them together into a better proposal, or move all proposals forward through different decision-making tools. People often (but not always) trust the facilitator to make these kinds of process decisions.
Straw poll	"We have two proposals here. Each proposal is written on a separate piece of flip chart paper over there. Let's just do a quick straw poll. You can only vote for one. Who here supports proposal 1. Who here supports proposal 2. Now remember – this is just a straw poll. It's not binding. We're just testing to see what level of support each of these proposals has among you all."	A straw poll is a non-binding method to determine where people are at on one or series of proposals. What's critical here is that you must be super clear about the details of each proposal (write them down), and how many times people can vote.
Assessment Criteria	"So we have some criteria that we developed earlier to help us assess each of these proposals. How about we break out into two groups, and each group can rank each of	It's extremely useful to decide the criteria in advance. Here is some criteria that you can use when you're engaging in campaign planning. And here's some criteria that the steering committee of the

	these proposals against the criteria and then give a report back. Let's do a 1 to 3 ranking, with 1 meaning it totally meets this criteria, 2 means it somewhat does, and 3 means it doesn't meet the criteria."	California Food and Justice Coalition developed in advance of a three month campaign planning process to decide their signature policy campaign. It can also be wise to specific which criteria MUST be met, and which criteria we would LIKE to meet. If it's a small group you could reasonably assess different proposals one after the other; the advantages of having people self-select into groups to discuss specific proposals is that a) you get to see which proposal might have more juice than the other (hint; more people will want to discuss the proposal they like) and it's easier to debate the details.
Spectrogram	"So let's see where we stand on the proposal of launching a campaign to expand subways. The proposal is written on that piece of flip chart paper. So, stand closer to this side of the room if you are in support of this proposal; the closer you are to the wall, the more you're into this proposal. Stand on the opposite side of the room if you do not support this proposal. Once again, the closer you are to that wall the more you are opposed to the proposal. Stand in the middle of the room if you are not either strongly for or against. Maybe you're undecided?" "Now let's turn this into a quadrant. I want you stand on this side of the room if you deeply care about this proposal; and I want you to stand on the opposite side of the room if you don't care what we decide. Stand in the middle if you kind-of care or if it's complicated." "Great. Now let's have people in the deeply opposed and deeply care corner speak up. Why are you there? And what it take for you to move closer to the other quadrants."	You often need to state the instructions twice for people to understand what they are being asked to do. It's best to have one main point for each spectrogram; it doesn't make sense if you ask people to stand on one side of the room if they like proposal B and the other side of the room if they like proposal A. Spectrogram are fantastic for teasing out where people actually stand on a specific proposal. Spectrograms are also a very useful way for everyone to share their viewpoint, even the quiet people as a person's position in the room represents their position on the proposal. It's often useful to facilitate a discussion with everyone still standing; you can give people the option to move around the spectrogram or quadrant as their opinion changes in response to the discussion. Another possible next step is to ask the people who feel strongly about the proposal but have different opinions on it to meet in their own time and identify a new proposal that satisfies them.

Quadrant Exercise

Care deeply about this decision

For proposal   Against proposal

Don't care what we decide

| Dotmocracy | "You all now get to voice your opinion on what of these five campaign ideas we should start. We're going to use dotmocracy. We thinking it would be reasonable if you got two green dots and one red dot. You put the green dots next to proposals that you support. We've written the proposals up here on separate pieces of flip chart paper. You can put two green dots next to the one proposal. We want to limit it | Dots are useful because it forces people to independently choose what they think is important.   It's like voting. People usually take dotmocracy seriously.

Dotmocracy can be useful if you have multiple meetings that are being attended by different people and you need to amalgamate the results.

Think carefully about how many dots you issue; if you must narrow down the |

	to two proposals as we have decided we only have the capacity to run one campaign. You hae the option to use the red dot if you choose; you put the red dot next to proposals you don't think we should choose."	options (like in campaign planning sessions) then limit the numbers of dots; participants need to be encouraged to make tough decisions. You can have different types of dots; it's usually common to have dots representing support, and dots representing opposition.
Consensus voting	"Let's see if this proposal is something we can consensus on. Can someone read out the proposal to the group?" (This is done.) "Great. If you are in support of this proposal then do a 'thumbs up'. If you're standing aside then put your hand out flat. That means you don't love this proposal but you're willing to let it pass. If you're opposed then put your 'thumb down.' Okay, so it didn't pass. We have eight in support, one stand aside, and one opposed. Vrinda you have your thumb down. What is wrong? How do you think we should reach agreement?"	Different groups have different hand signals; use whatever is the custom. It's common to taint the consensus voting process with your enthusiasm for a solution saying things like "okay so are we all cool with this awesome proposal?". If your group has a culture of doing this, then that might be okay, but it's fairer to use more impartial language. It's also common for facilitators to not fully go to the vote, saying things like "Well it seems like we have consensus on this. What's the next topic on the agenda?" It's common to check in with "nos" in order to identify their concerns and see if they can suggest proposed solutions. It's best to present one proposal a time, and to very clearly explain how people can express their position, be it yes, no, or stand aside (which means the person is not supportive of the decision but is not going to stop the approval process). Even if the vote passes, it's wise to carefully gauge whether this proposal has the level of support needed to be successfully implemented. If there's a lot of stand asides on a controversial proposal or a big decision that requires significant energy and time to execute then it's likely more discussion is necessary.
Anonymous voting.	SENT VIA EMAIL "You have the next two weeks to vote for who you want to sit on our organization's steering committee. Click on the	An online voting strategy is useful if members or people are not geographically located near each other.

	link, review the five candidates' resumes and positions, and then choose which candidate you would like to support. The candidate with the most "top" votes will sit on the steering committee for two years. Your votes are anonymous."	It's common for positions on boards or executive committees to be decided by anonymous voting. The benefits of anonymity is that people are less vulnerable to peer group pressure, and less likely to be treated favorably or unfavorably (especially if they're voting for their bosses' boss?) as a result of their vote.
Postpone it.	"We've been talking about how we're going to deal with our funding crisis for 45 minutes. It seems like there's some people who need questions answered before they can agree to a plan. And it also seems like we have a few people who disagree on the direction we need to take to solve this problem. How about we identify a few people – including those who feel strongly about this issue – who can meet in their own time and try to come to a proposal to present to us at our next meeting next week. And how about we do a go-around so each of us can share one piece of information or advice that we want this committee to consider when they meet in their own time?"	You can't postpone a decision if the matter is urgent. In those urgent situations you have to keep persevering – although you could set up a break-out group that meets concurrently to craft a proposal, while the rest of the group tackles other agenda items. It's important to clearly identify next steps, including what the decision is, who is going to deal with this decision, and how long do they have to deal with it.
Next steps.	"Okay so let's decide our next steps. How about we go through each main agenda item. Leah – you were taking notes. Can you tell us what next steps we agreed upon when we dealt with the first agenda item? Just tell us what the decision is, who is doing it, and when it's due. And let's make sure to start our next meeting by hearing how far people have progressed with their tasks."	When it comes to next steps you want to identify who is doing it, what they're doing, and how long they have to do it. Reminding people about their tasks is an extremely useful way to hold people accountable and have them do their tasks. It's useful to both review the notes to identify next steps, AND ask the group to identify any additional next steps that haven't been mentioned yet. It can be useful to keep a record of "to dos" or "next steps" on a piece of flip chart paper so people have a visual display of their responsibilities throughout the meeting.

Decide next meeting.	"Okay, can people get out their phone and calendars please. We're going to decide the date of next meeting. Can someone please propose some dates? Okay, who cannot do January 2nd. Can I get a show of hands? So three of you can't do it. Okay, who's got another date to throw out? January 10th? Who can't do that date. I see no hands. Okay, let's go with January 10th."	You're creating a lot of extra work for youself if you don't schedule the next date at a meeting. If you don't schedule a meeting date you can always resort to calling people (starting with the most active or important people) or using surveymonkey.com. If someone says "oh I didn't bring my calendar" then it's useful to just choose a date and then choose a backup date if that first date doesn't work for people. Remind people to bring their calendars. If scheduling a time is proving really difficult then you could go with the date that suits the most people. Alternatively you could select the time that's best for the people who are a priority to the meeting or group (eg, co-chairs, most involved, most impacted by decision). You can say something like "It seems like we're having difficulty choosing a date. I would like to prioritize folks who are wanting to put considerable energy into this. Is that okay?"
Assign someone or ensure that someone is following up with people to make sure they take action.	"We need someone who can follow up with people and remind them of their tasks. Who can do that?"	Usually this is the organizer. People are more likely to do their tasks if they get a reminder call.
Type up, and distribute the notes.	"Can we have the notes typed up in the next few days and sent around please? Who would like to take this on."	It's usually okay for note takers to just summarize next steps, tasks, and key decisions. Note takers can also summarize key feedback and points of tension. Make sure to send the notes around to everyone. It's also useful to post them in an obvious spot that everyone can access, such as a google group word document. That way you have a collective record of what was decided, even if people delete their emails.

TIPS ON FACILITATING A WORKSHOP ON FACILITATION.

Introductions

Ask people what level of experience they have with facilitation.   Ask "Who's faciliated a meeting before?", then "Who's faciliated 10 meetings before?", and then "Who has facilitated 30 or more meetings."   Keep going until there's no hands left standing.

Have people form groups of three.   Ask people to take turns taking two minutes each "sharing a personal story of a bad meeting you've experienced. What made it so bad? Think about the role of the facilitator, the behaviours of participants, the actions or inactions of the group hosting the meeting."

Ask each group in turn to share one factor they have identified through their story-telling that makes meetings "bad". Ask the group to give an example. Write the factors on a board. Go through each group until you have a range of examples on the board.

Board

Problem	Example	Solution
No pre-planning.	No agenda was developed or shared with participants in advance of our organization's day-long strategic planning meeting. We wasted three hours setting the agenda together.	

Tell participants that we'll be generating solutions to these problems during the workshop. When possible solutions to these problems are identified through the course of this workshop, return to this table and fill in the table.

ADVANCED FACILITATION WORKSHOP STRUCTURE

It's important that participants have some facilitation experience.

Get into groups of two. Someone interviews their buddy about one challenge they are facing as a facilitator that they want help with in this workshop. The interviewer's job is to ask for stories and get the facilitator to explore why this is a challenge. Take turns being the interviewer and interviewee. Give people two minutes each to talk about their challenge.

Post the following questions on flipchart paper to give interviewers some guidance on what questions they could ask:
• What is the challenge you would like to work on?
• Why is this important to you?
• What were some underlying dynamics that created this situation?
• How would you describe the feelings or "vibe" in that moment?
• What do you think contributes to this challenge?
• What strategies have you tried to overcome this challenge?
• What strategies would you like to try?

• What could the group have done to support the facilitator?

Then have each person individually write down their challenge on a piece of sticky paper and post it on a board.   Give people a 10 minute break. During this break you – along with some volunteers - collectively group people's challenges into broader categories. Make it clear that the volunteers are assisting you, but that you get final say. It is important that these pieces of paper are categorized properly.
Categories that might arise include:
• Conflict
• Dealing with disruptive people
• Unclear decision making process
• Poor implementation of issues
• People feel their voices are not being heard

Randomly assign people into groups of two.   You could do this by asking people to number off 1 to 6 (if there are 12 participants) and have the 1s get together, the 2s get together and so on. Once people are in their groups explain the exercise.

Tell them they each have 45 minutes to prepare a 25 minute exercise designed to help the entire group "explore and identify solutions to the challenge you have chosen."   Tell the groups they'll get to pick a challenge from the board.

Also tell them that they'll be given feedback for about 25 minutes after they have completed their exercise. The feedback will consist of the following four steps:
• What did you do well? (Participants and workshop leaders give feedback. Facilitators can only ask clarifying questions in order to understand the feedback.)
• What's some constructive advice or feedback we could give? (Once again, participants and workshop leaders give feedback. Facilitators can only ask clarifying questions in order to understand the feedback.)
• Facilitators respond to the feedback they've heard.
• The group adds to and critiques the solutions identified to address the challenge.

Explain to each group that they will have the option to practice their facilitation tools to this group for 25 minutes. Encourage them to try out different facilitation tools.   Tell them that if they're going to make decisions they'll need to use consensus.

Choose a random process to decide the order in which each group gets to pick a challenge from the categories on the board.   For instance, you could put each group's number on a piece of paper in a hat and then pull out these pieces of paper one by one. The order you pull out the numbers dictates the order in which groups choose their categories.

Work actively to support groups as they prepare their workshops. Give constructive feedback if it is asked for. Give extra time if people need it. This process of preparation is an incredibly learning experience.

To choose who facilitates first ask groups who want to facilitate to put their numbers in a hat; pull out a number. Continue these rounds of facilitation for as long as you wish. Make sure to give facilitators a chance to add or remove their name from the hat before each round.   This random process of selection is useful if you don't have enough time for everyone to facilitate, or if there are some people who want to watch others facilitate before they do so themselves.

During the conclusion, quickly review the "tools" that either you or the facilitators used throughout the workshop. Tools might include "Brainstorm", "Spectrogram", "Small groups", "Numbering off", etc.

To evaluate the workshop, start off by having the workshop facilitators critique themselves. Then do a popcorn where participants have the option of sharing something they liked about the workshop, and something they think could have been improved upon, or done differently.

FACILITATION RESOURCES

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http://www.jofreeman.com/joreen/tyranny.htm

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