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Effective Facilitation: Build Your Skills

Cheryl DeConde Johnson, Ed.D.

Audiology-Deaf Education vantage consulting

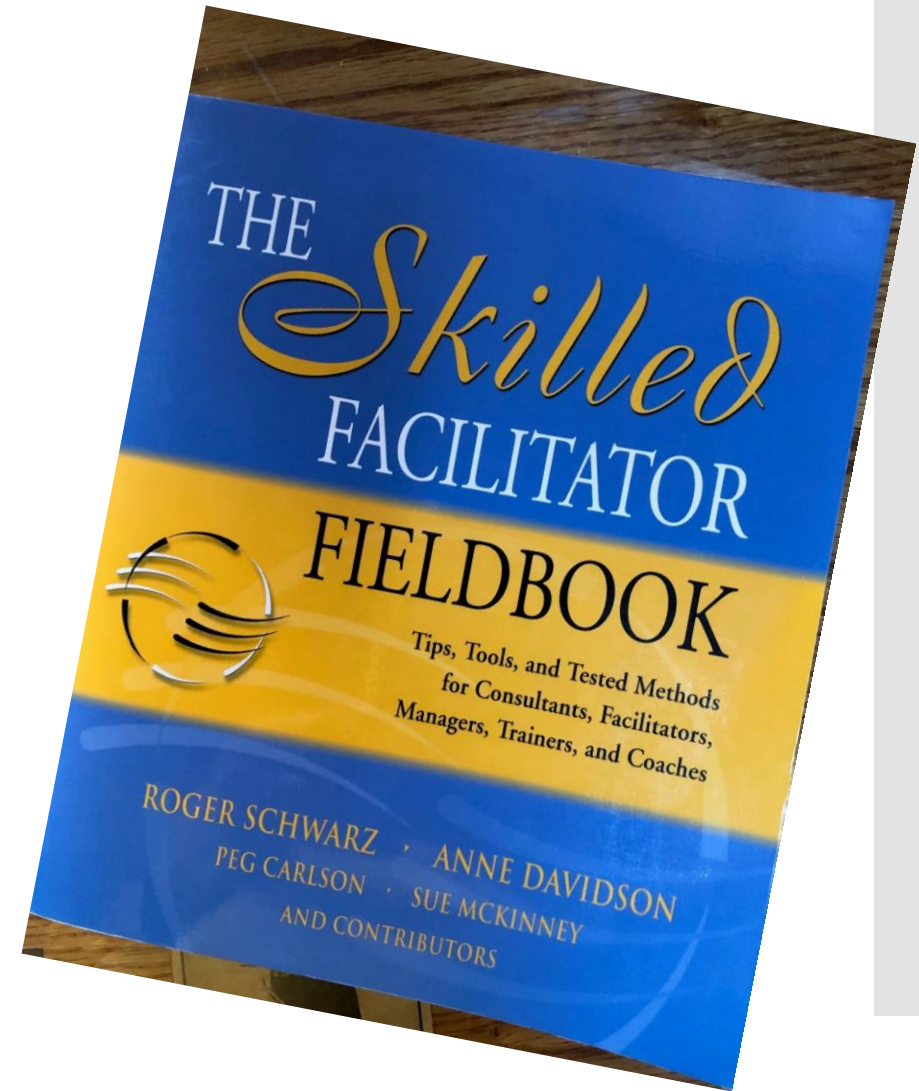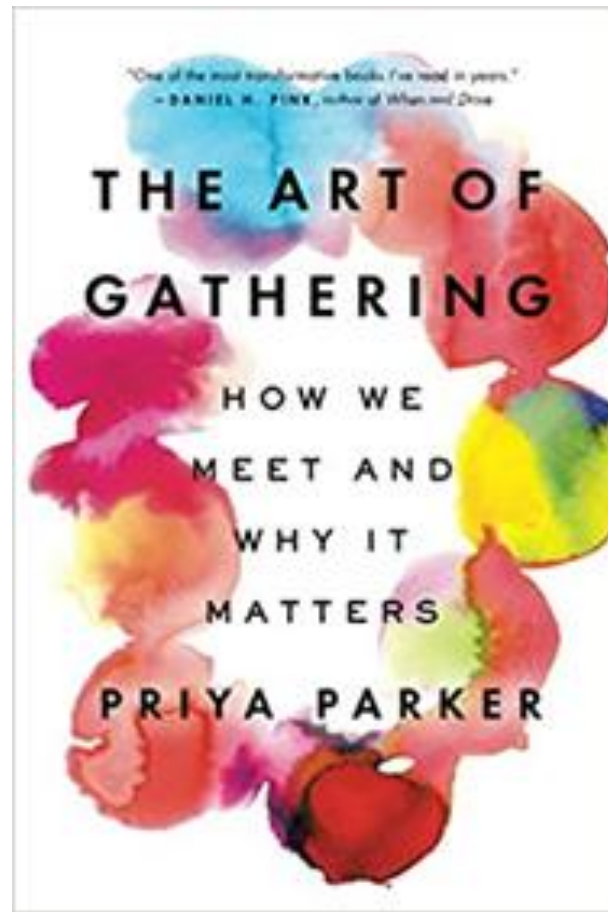cdj1951@gmail.com
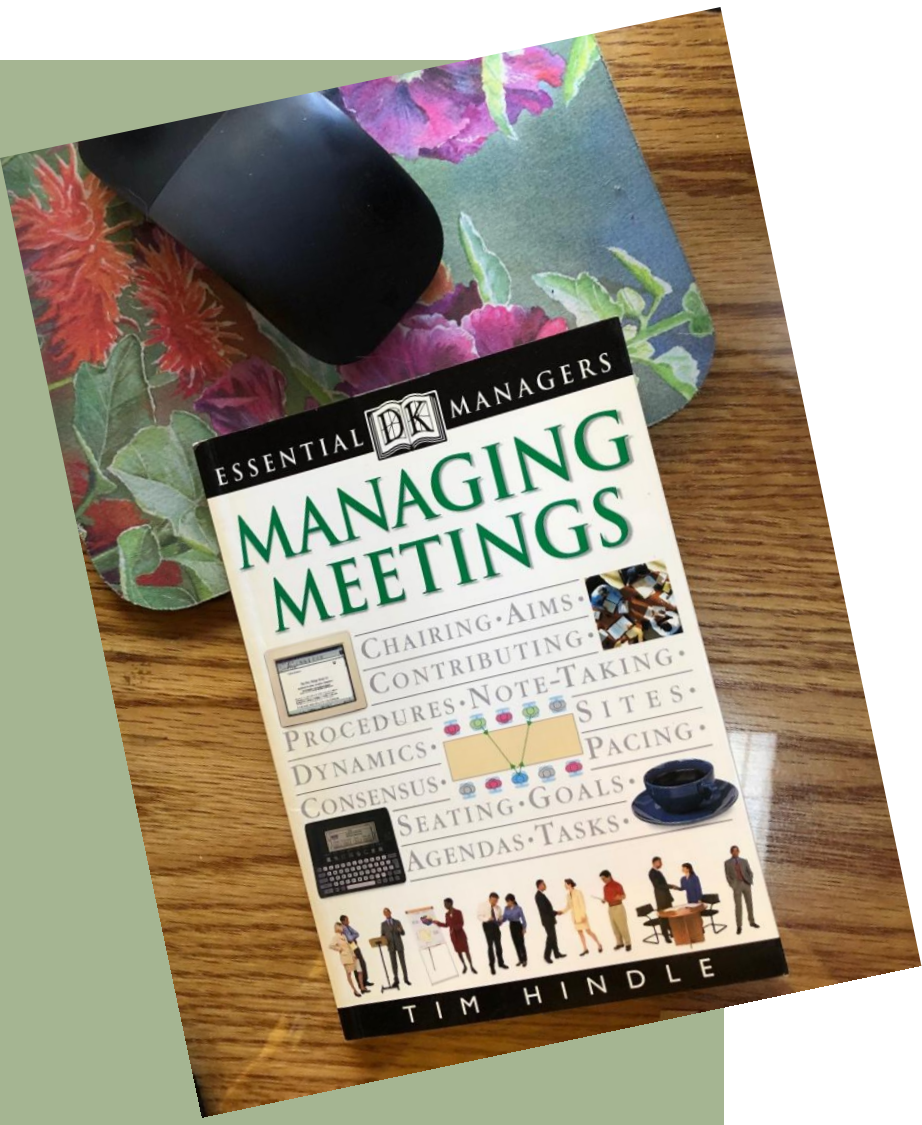
www.adevantage.com

Resources & Handouts

Resources

- The Complete Facilitator: A Guide (1994). Howick Associates, Madison, WI.

- Effective Facilitation: Build Your Skills, Janet DesGeorges & Cheryl Johnson, presented at Hands & Voices Leadership, Franklin, TN. Sept 16, 2021

Handouts

- Evaluating Your Skills as a Chairperson

Essential Managers: Managing Meetings

MANAGING MEETINGS

CHAIRING · AIMS
CONTRIBUTING
PROCEDURES · NOTE-TAKING · SITES
DYNAMICS · PACING
CONSENSUS · GOALS
SEATING · GOALS
AGENDAS · TASKS

TIM HINDLE

"One of the most transformative books I've read in years."
— DANIEL H. PINK, author of When and Drive

THE ART OF GATHERING

HOW WE MEET AND WHY IT MATTERS

PRIYA PARKER

THE Skilled FACILITATOR FIELDBOOK

Tips, Tools, and Tested Methods
for Consultants, Facilitators,
Managers, Trainers, and Coaches

ROGER SCHWARZ · ANNE DAVIDSON
PEG CARLSON · SUE MCKINNEY
AND CONTRIBUTORS

The Facilitator

Why have a Facilitator?
- Teamwork is critical for organizational development
  - Problem solving
  - Long –term planning
  - Process improvement
- Teaching teamwork

- Role of the Facilitator (Traditional)
  - Listens
  - Be objective and impartial
  - Provide candid feedback
  - Offer suggestions that promote teamwork and goals of organization
  - Supports but does not participate in the work of the team
  - Monitors team progress

Team Leader Roles

- Active team member
- Has a vested interest
- Voices opinions and ideas
- Provides input
- Is part of the decision making
- Represents the team within the organization
- Gets resources for the team to do its work

Dual Roles as Team Leader and Facilitator

- Listens

- Keep the meeting focused and moving along

- Help team members be clear about their task, roles, and responsibilities

- Outline steps the team will use

- Guide the team in the development of an action plan

- Effectively manage meetings

- Balance participation among team members

- Encourage constructive discussion on controversial issues

Reluctant or not, facilitation is part of the role of every leader

1. Preparation

Define Meeting purpose

Decide how long it should last

Ensure the relevant people attend

"Those who fail to plan, plan to fail." – Ben Franklin

WHAT kind of meeting is needed?

What is the purpose? What do you expect to achieve?

- Management (problem solving, decision making)
  - Addressing problems
  - Making or implementing decisions
  - Imparting advice
  - Issuing instructions

- Process and planning (strategic or organizational planning, development)
  - Generating creative ideas
  - Presenting a proposal for discussion
  - Long term planning
  - Plan-Do-Study-Act (PDSA)
  - Strengths-Weaknesses-Opportunities-Threats (SWOT)

- Formal vs informal

Type of Facilitation needed?

- Independent Facilitation (external, neutral to outcome)
- Meeting Chair: Leadership facilitations (internal, impacted by relationships and outcomes)
  - Co-Facilitator (shared facilitation, tracking participation, timekeeper, notetaker)

WHO are the Participants?

- What is your relationship to the audience/participants?
- Who needs to be at the table?
  - Direct involvement
  - Indirect involvement
  - 6-9 participant is generally best

WHERE? HOW?
Meeting Room Set-up & Other Considerations

- Rooms size should match group size needs
- U-shape seating vs table
- Seating arrangements based on persons attending (tactical seating)
- Name tags or table tents
- Paper/pen for individual notetaking
- Flipchart/markers/stickies for group work
- Access accommodations
- Remote participation
- Technology needs – verify functionality in advance
- Time of day – are snacks needed
- Be aware of potential interruptions – external noises, fire alarms/drills, internet goes down

Remote Meetings

Considerations:

- Internet access

- Meeting platform (Zoom, Teams, Face Time)

- Accessibility – interpreter spotlighting, captioning, transcription

- Recording

- Protocol for participating (hand raising, chat box)

Tips:

- Know your platform
  - Get help with technical aspects of the meeting

- Think about your mute button and what that does to 'control'

- Pause for accessibility delays

- Be *really* prepared with accessibility features
  - Turning on/off cameras

Agenda Development

Content

- Include context (why are we here): purpose and outcomes for meeting
- Keep as short and simple as possible
- Time ordered agenda with topics and presenter names
- Put most important items first
- Plan A, B, and maybe C
- Participant agenda vs facilitator (process) agenda

Notetaker

- Appoint a reliable notetaker ahead of time rather than asking for a volunteer at the meeting
- Consider displaying notes on a monitor
- Stick to timelines unless…
- Use the "parking lot"

Participant vs Process Agendas

Participant Agenda
- Location/date/time
- Purpose of meeting
- Time-ordered agenda

Process Agenda for the Facilitator or Chair: Add -
- Room set-up
- Food if provided
- General accommodations/technology
- Handouts
- Details of who is responsible for each agenda item, materials and technology needed, room set-up changes if needed

Room Set-up: U shaped table arrangement; LCD, Lg Post-It pad/markers, 3x5 cards, stickie notes

Accommodations:

Handouts: Crosswalk JCIH/APR

Food: Morning coffee, lunch, provided by MDC

Time	Item	Presenter/Notes
8:30 AM	Welcome & Introductions, Participation & Communication Considerations, Meeting Goals	Sarah: welcome Cheryl: facilitate introductions, communication considerations, mtg goals

Communicating ahead of the meeting

- Agenda and supportive/supplemental information in advance

- Meeting logistics – directions, parking, building check-in if required, COVID requirements if relevant

- Participant expectations

- Communication guidelines and meeting etiquette

- Request needed individual participant accommodations

Caution!

Don't hold a meeting when:
- You lack a specific agenda
- Just because it is scheduled
- Other methods would work better
- Other demands take priority
- You can consolidate with another meeting
- Several people cannot attend

2. Managing the Meeting

Opening

The Agenda

Closing

"Those who fail to plan, plan to fail." – Ben Franklin

Opening

1. Start on time
2. Welcome – Introductions (if needed; limit the time)
3. Warm up – Set the Tone
   - What do you hope to learn/take away as a result of the meeting?
4. Explain the purpose, desired outcome
5. Review the agenda, make modifications if needed
6. Review communication guidelines/ground rules
7. Clarify role of participants (e.g., timekeeper, notetaker)

Accomplishing the Agenda

- Start with a well – planned, time-ordered agenda
- Keep your facial expressions and voice tone positive
- Know where your participants stand & prepare for potential conflict
- Focus on one item at a time
- Ensure common knowledge of vocabulary, acronyms
- Collect and clarify the relevant information
- Seek suggestions, solutions, alternatives; consider whether discussion time is needed to develop shared understanding
- Summarize discussion on each agenda item, get consensus if needed
- Keep participants focused
- Be flexible – negotiate time, topics, if needed
- Maintain a "parking lot"

Describe the Purpose

- As a Facilitator, it is your job to help guide the conversation with participants about what the purpose of the meeting is.

- As a leader who is setting the agenda and leading it, it is your job to have a clear understanding of your purpose.
  - A category is not a purpose (i.e. Staff meeting, stakeholders meeting, board meeting)
    - Commit yourself to a bold, sharp purpose (find your 'something')
    - Specificity is crucial; tip: keep asking why (drill down)
    - What is your desired outcome?

Closing

- Closure activity – "ah-ha" moment, meeting take-aways
- Review meeting accomplishments/outcomes
- Summarize decisions
- Review assignments
- Determine "parking lot" status
- Determine next steps
  - Agenda for next meeting
  - Date/time
- Provide meeting notes to participants
- When is feedback helpful (meeting evaluation)

3. Facilitation Finesse

Inclusivity

Interactivity

Personal Style

Build a Climate for Open Communication

Permission

- Model open and honest communication

- Announce in advance that issues should be brought up for discussion

- Provide ways to raise concerns in a structured manner

Respect

- Listen thoughtfully

- Value all contributions

- Do not allow others to attack, ridicule, or interrupt

- Keep conversations focused on topic

- Ground rules

Initiative

- Answer questions

- Ask for responses and input

- Record all contributions

- Ask individuals by name for input

- Thank people for input

- Follow through on issues, suggestions, input

Create an Inclusive Environment

- Drawing out the quiet ones
  - Technique: "I'd like to hear from someone who hasn't made a comment yet"
  - Ask ahead of time for someone you know who is typically quiet to be prepared to be called upon for a specific topic

- Handling the talkative ones
  - The stage/microphone is your control
    - Be careful about handing it over
    - 'Cutting off' politely – say in advance you might do that!
    - Hand on the shoulder technique

- Responding to questions
  - Not every question is a question (more 'comment' like)
  - Make the person repeat the question if you don't understand it/and/or rephrase to make it manageable
  - Some questions are unanswerable
  - Don't' get trapped into 'bias' questions

- Pause for accessibility

Interactivity

- First rule - Listen

- Second rule - Try not to be an *overtalker*

- Ask questions!
    - Put content into questions even though you know the answer
    - Put questions into your written notes/ppt. so you 'stop' and ask
    - Ask questions you really want an answer to – not just for the sake of interactivity

- Interactivity reduces what content you will be able to get through

- Introduce techniques such as idea storming, elbow partners, and working groups to make the meeting more efficient and participatory.

- The wisdom among us! - combine your expertise with that of the participants

Managing Yourself: Embracing and mitigating your own personality and temperament

- Overtalker
- Great listener
- Afraid to interrupt to keep things moving
- Time stickler at all costs
- Great at summarizing others points
- Gets nervous
- Nerves of steel
- Says what you think
- Let's others have the last word
- Let others make the point

Oh, you don't have any weaknesses? Excellent, because we really only like to hire people with no self-awareness.

BELIEVE IN YOURSELF

Ask Questions to Define the Problem

- Why is this a problem?

- Is this a problem or reaction to a situation?

- What is the scope of the problem?

- Who does it affect? How?

- Is more information needed? Where?

- When did the problem happen?

- What changes have already occurred to address it?

- What seems to be causing the problem?

Explore Solutions

Idea Generation

- Brainstorming

- Brainwriting

- Affinity

Tips:

Check for clarity and common understanding

Structured Decision-Making

Benefits:

- Choices from available options
- Minimizes personal whims
- Objective
- Discussion to understand rationale
- Objectivity makes it easier to communicate the decision

Methods:

- Poll participants (voting)
- Multi-voting – series of votes to reduce options
- Decision Matrix

Implementation - It's all about planning

Considerations:

- Will the solution be accepted by the necessary parties, including authority figures?
- What resources (e.g., time, money, people) will be needed?
- What is the timeline and sequence of steps?
- How will this be communicated to others? How will feedback be received?
- Contingencies…What are plans B & C if needed?
- What will keep the implementation effort going?
- What is the team's role after the solution is implemented?

Decision Matrix: Goal/Activity Prioritization Worksheet

#	Project/Work/ Goal/ Objective	Importance What is the urgency or impact?	Ease What is the relative ease of achieving it?	Time Required Can it be achieved in reasonable amt of time?	Return on Investment What is expected payoff?	Supports & Resources Availability of support & resources?	H&V "Sniff Test" Does it pass the "sniff test"?	TOTAL POINTS	Priority
		Rate 1 to 5 High = 5 Low = 1	Rate 1 to 5 High = 5 Low = 1	Rate 1 to 5 High = 5 Low = 1	Rate 1 to 5 High = 5 Low = 1	Rate 1 to 5 High = 5 Low = 1	Rate 1 to 5 High = 5 Low = 1		
1								0	
2								0	
3								0	
4								0	
5								0	
6								0	
7								0	
8								0	
9								0	
10								0	
11								0	
12								0	

Strengths	Weaknesses
SWOT	
Opportunities	Threats

Logic Model Plan

Resources/ Inputs	Activities	Outputs	Outcomes	Impact
What resources are needed for program operations to support your work?	What will you do to accomplish your goal?	What products/activities will you produce?	What will happen as a result of your work?	What long term changes do you hope to result form your work?

Planned Work — Intended Results

4. Dealing with people problems

Prevention

Conflict Management

Word-smithing

Common Problem Behaviors

Problem Behaviors

- Long winded speakers
- Side conversations
- Interrupting
- Silence
- Off subject speeches
- Personal attacks
- Focused on negatives
- Sleeping

Prevention

- Prepare thoroughly
- Practice specific comments you might use to intervene
- Prepare solutions before problems arise
- Discuss concerns with the individual outside the team setting
- Plan seating arrangements; avoid "power" positions (e.g., head of table, corner of the room)

Interventions

- Non-Intervention
  - Pause and see if other participants handle the situation

- Low-level Intervention
  - Reference ground rules, shift eye contact, input from another participant may end the behavior

- Medium –level Intervention
  - If chronic, speak with person individually – offer feedback and get person to agree to desired behaviors

- High-Level Intervention
  - Often occurs with other participants, avoid blaming, stay focused on the behavior; be cautious of alienating other participants

Conflict Management

- Conflict may result from feeling ignored or misunderstood.
- Listen for underlying issues, concerns or emotions. Help bring them out so they can be dealt with.
- Intervene immediately if personal attack, aggressive or discriminatory behavior.
- Neutrality on the issues discussed. Avoiding taking sides or manipulating the meeting towards a particular outcome.
  - When NOT to be the facilitator: If this becomes difficult, or you know in advance that you'll struggle to remain impartial try letting someone else facilitate; making it clear when you're expressing your own opinion; knowing you need to be a part of the discussion more than the role of the facilitator.
- Time out - if necessary, call for a break.
- Read good books, (crucial conversations; collaborating with the enemy) and talk to other facilitators if you know you are going into a tough meeting.

Strategies to Reduce Wordsmithing by Committee

- Agreed upon - "Today we are wordsmithing"; "Today we are not wordsmithing"

- Who gets to decide what words to use?

- Getting caught in the weeds

- No solution?   How to get to yes with everyone about words we are using.

- Language is always in flux when used to "categorize" people for purposes of discussion and services, but for ease and clarity of communication, a term was chosen for this document's focus.

Building Consensus

Consensus means:

- All people support
- Does not mean full agreement

Tips:

- Don't force consensus to avoid conflict or complete the task
- Seek ways to combine different points and different positions
- Those with official authority should go last
- Schedule enough time
- Avoid reducing the decision to a vote or coin toss
- Encourage everyone to participate

Self-Assessment: How are Your skills as meeting leader?

Evaluating your Skill as a Chairperson[1]

Evaluate how well you perform as a chairperson by responding to the following statements and mark the options that are closest to your experience. Be as honest as you can: if your answer is "never" mark Option 1; if it is "always" mark Option 4; and so on. Add your scores together and refer to the analysis at the end to see how you scored. Use your answers to identify the areas that need most improvement.

1 I begin each meeting at its scheduled start time.
① ② ③ ④

2 I ensure that participants understand the minutes of the previous meeting.
① ② ③ ④

3 I follow the approved agenda for each meeting.
① ② ③ ④

4 I explain the purpose of each meeting clearly to all the participants.
① ② ③ ④

5 I allow all points of view to have a fair hearing.
① ② ③ ④

6 I am aware of each participant's motives and hidden agendas.
① ② ③ ④

7 I ensure that all participants are fully involved in each meeting.
① ② ③ ④

8 I make sure that I am thoroughly prepared for each meeting.
① ② ③ ④

9 I refer to a meeting procedures guide before each formal meeting.
① ② ③ ④

10 I make sure that full and accurate minutes of each meeting are taken.
① ② ③ ④

11 I ensure that participants know what action to take before the next meeting.
① ② ③ ④

12 I ensure that participants know the time and place of the next meeting.
① ② ③ ④

Analysis:
12-24: Your skills as a chairperson need considerable improvement; rethink your approach to the role and take action.
25-36: You have definite strengths but must concentrate on improving weak points.
37-48: The meetings you chair should run smoothly. Since each meeting is different, continue to prepare well.

[1] From Managing Meetings (1998) by Tom Hindle, NY: DK Publishing Inc.

Questions

https://www.surveymonkey.com/r/FL3Webinar_5DEC2024