

**INTRODUCTION**

Facilitation supports effective meeting management and decision-making. Facilitation is about ensuring that all individuals and groups who are participating in a meeting are involved in a meaningful way, and that decisions are based on their input and achieve their mutual interests.

**MEETING MANAGEMENT**

For a one-hour meeting, it can take more than one hour to prepare, and at least one hour to follow-up. Some considerations:

<b>BEFORE</b>	Decide on the purpose of the meeting, and whether or not it is actually necessary ( <i>i.e., how else could we accomplish these goals?</i> ) Plan the meeting carefully: who, what, when, where, why, how Prepare and send out an agenda in advance ( <i>including topics, objectives, timing, etc.</i> ) Plan logistics Come early and set up the meeting room
<b>DURING</b>	Start on time Set groundrules; define roles Review, revise, (re)order the agenda if necessary Agree on outcomes Set clear time limits Agree on decision-making Review action items from the previous meeting  <i>At the end of the meeting:</i> Review action items and next steps (who, what, when) Set the date and place of the next meeting and develop a preliminary agenda Evaluate the meeting (+/Δ) Close the meeting positively Clean-up, rearrange the room
<b>AFTER</b>	Prepare and distribute the group memory, minutes/notes Follow-up on action items, and begin to prepare for the next meeting

**PROCESS TIMEOUT (Strategic Moment) TOOL**

**To regain focus**, ask: “Are we all on the same task?”

**To seek closure**, ask: “Raise your hand if you’re in agreement about this? What’s the next action?”

**To check the process**, ask: “Where are we? What’s our objective? How do we accomplish that objective?”



**FAST FACTS**

**What is it?**

Facilitation is a process and methodology that supports information-sharing, collaboration, and decision-making. In meetings, facilitators provide content, process, tools, and structure to help individuals and groups work more collaboratively and efficiently to accomplish their objectives.

**What does it look like?**

Facilitated meetings:

- Work towards clearly understood objectives
- Use groundrules and process tools where appropriate
- Stay focused on the topic at hand, avoiding tangents
- Define meeting roles: leader, facilitator, recorder/scribe, timekeeper, etc.
- Document action items, agreements, communication items, and open issues

**Who can do it?**

Facilitators may be neutral outside third parties or meeting leaders (*i.e., managers or directors*), or even meeting participants (*i.e., individual contributors*). In fact, delegating the “facilitator” role is a positive way to share responsibility for achieving outcomes. Meetings are more successful when everyone comes into the room with a facilitative mindset.

**What’s the value-add?**

The English word “facilitation” comes from the French word *faciliter* which means “to render easy.” Facilitation, therefore, is about making meetings and discussions easier to track, easier to participate in, easier to follow-up on, easier and more productive in general.

## HOW TO ENCOURAGE PEOPLE TO TALK WHEN THEY'RE QUIET

Try the following techniques and tools to encourage conversation:

### Go-around/"Round Robin"

Go-around the room, asking for one idea from each person; rotate who goes first each go-around; time the go-around using a digital timer or an egg timer so that each person has the opportunity to speak and folks are encouraged to be concise

### Individual Thinking Time ("I-Time")

Give people time to note some ideas on paper or post-its first, then invite them to discuss, brainstorm, etc.

### Group Exercise/Small Groups/Breakout Sessions

Put people in pairs or groups to tackle a task, then ask for report-outs to the entire group

### Pay Attention to Body Language and Facial Expressions

Call on people who look like they want to speak

### Ask Open-Ended Questions

Ask what's going on in the room, ask a new (or provocative) question pertaining to the discussion topic

#### Use open-ended questions to:

- Get information (who, what, when, where, why)
- Get out feelings and opinions ("How do you feel about...? What do you think about...? What's your reaction to...?")
- Clarify content ("Are you saying...? Do the facts seem to point to...? Can anyone summarize what we have so far?")
- Widen the discussion ("What haven't we thought of yet? What else do we know about...?")
- Check the group process ("What's going on right now?")
- Move the group towards closure ("What do we have agreement on? How many of you agree on...? How many disagree? What's the next action?")

## HOW TO DEAL WITH DIFFICULT PEOPLE

Some strategies to try:

- "Slingshot" the negativity: Ask the person to suggest a solution to the problem
- Give feedback in the meeting to defuse the emotion (*Validate what you're hearing ["It sounds like you're angry or frustrated..."] and ask how the group can proceed*)
- Take it offline if it's a recurring issue
- Go to the group: "What do you think of Charley's comments?"
- Refer to flipcharts/notes to get the conversation back on track
- Let the person have their "emotional storm"; listen empathically, then ask the group: "where can we go now?"
- Enforce groundrules
- Use body language: stand up, walk towards the person, touch the person lightly on the shoulder, etc.
- Use a "parking lot"

## DO'S AND DON'TS

### What you should do

Set/review groundrules on how the group will work together

Make sure you have agreement on the purpose, objectives, and outcomes of the discussion

Acknowledge the contributions of group members

Check for agreement/disagreement

Summarize frequently

Be willing to suggest "process" to move the group along

Use open-ended questions

Use silence to encourage group participation

Help the scribe/notetaker keep on track

Check in with the group to see how things are going from their perspectives

Confront all misunderstandings, bad feelings early on

Be aware of your body language

Use humor wisely

Be enthusiastic, human, and flexible

### What you should NOT do

*Don't forget remote participants!*

Be careful about giving advice or evaluating; rely on the group instead

Don't interpret or paraphrase without checking back

Avoid closed-ended questions

Avoid talking too much!

Avoid getting pulled into tangents

Don't interrupt (unless it's appropriate/necessary)