

Facilitation Tips

Here are some notes for a workshop I give on facilitation skills. Please pardon the outline format and the jargon. If there's a concept or word you'd like me to explain, send an e-mail to fred@fredbartenstein.com.

Facilitation:

- To make easy.
- Process leadership.
- To provide structure (space, time, order).
- To compensate for certain tendencies in human nature (to wander, rush decisions, avoid decisions, dominant and recessive personalities).
- There are "schools" and styles. Whatever works.

Usually (when I can, when it is appropriate, when I remember) my style is to:

- Maintain health and stamina: mental, physical, spiritual. Keep my "stuff" out as much as I can while still being present and real. Stay in practice.
- Conduct advance interviews and make anonymous reports.
- Co-facilitate (for stamina and perspective).
- Provide a check-in. In the initiation phase, a participant's focus is primarily on: "Do I want to be here?" and "Am I safe?" Ask for essential reference information and a deepening, humanizing question. Post a template and model level of detail.
- Suggest and negotiate ground rules.
- Explain the discussion sequence and lead people through it. Generate options first. The priorities and group wisdom emerge. Divergence, "groan zone," convergence. Initiation, orientation, options, priorities, choices, fleshing out, reorientation (assignments, next steps), closure. Use time limits, queue, prioritization methods, consolidation, campaign speeches, consensus, parking lot.
- Track multiple levels of content and process. Actively scan the room. Pay attention with respect and compassion. Note non-verbals. Think ahead, think fast. (Canoeing analogy: flatwater, ruffles, and drops.) Keep my intuition alert. Attend to what is happening externally and inside myself, and share selectively.
- Be a process leader. Frees the positional leaders to participate and pay attention. Track content, but don't participate in content discussions. Aim for simultaneous loose-tight properties. On a continuum from elicitive to directive, I am a fairly high intervener. As a human pointer/traffic officer (eyes, arms, hands, body), I model attention to a particular person, subject or process. Manage a queue of people wanting to speak. Be able to absorb, envision, and propose a consensus position (expecting the group to refine it). Don't engage in the issue of room temperature (no win, I'll be warmer).

- Use myself flexibly, intentionally. Meet the clients where they are (guide from the elbow). Model optimism. Acknowledge frustration, resignation, hilarity, sadness. Stay detached but in close contact. On the boundary of the organization and its environment. It's the clients' work; let them do it. Don't give approval. It creates a hierarchy and perceived differentiation. Don't make judging comments.
- Manage time. Use time intentionally. Go slow to go fast. Pacing: quick but not rushed. Manage different anxieties. Know what time it is, how much has elapsed, and how much remains in the meeting and on a particular agenda item. (Radio/TV experience helps.) Renegotiate as needed. Monitor the need for a break (fatigue, wandering concentration, divisiveness). Use a "parking lot" (records unresolved issues, helps a discussion return to the track.) Take and use breaks; breakthroughs and reorientation often happen in breaks.
- Record. Provide a visible, contemporaneous record of proceedings. Write what people say. Helps them feel heard. Provides opportunities for correction. Supports visual learners. Filters emotional content. Helps with group amnesia (e.g. when a break ends).
- Seek consensus. Alternatives are: majorities rule, loudest rule, hierarchies rule, footdraggers rule. Record options. Ask for "campaign speeches." Take a straw poll. Ask those on the minority if they can support the majority position. If not: continue discussion, agree to disagree, or table.
- Trust the process. Trust my training, experience, and conditioning. Trust the group to correct anything that goes wrong and to suggest a direction when I am clueless. Expect breakthroughs. Stay humble – we're all human.
- Attend to closure/withdrawal. Make room for closing comments (e.g. today's meeting and where we are as a group). Closing comments gather feedback and help people find the collective mood and conclusion rather than project their own onto the group. A graceful transition to the next thing.