Agency, Systems & Community Health Improvement
TRAINING

Enhancing Your Facilitation Skills

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Objectives

- Describe and apply the principles of facilitation.

- Match facilitation design to level of involvement needed for desired outcomes.

- Identify and apply tools and techniques to improve group process.

Introductions

- Name

- Organization/ Agency

- Facilitation Experience Level

1_____2_____3_____4_____5
Little to None   My Fair Share   Expert Level
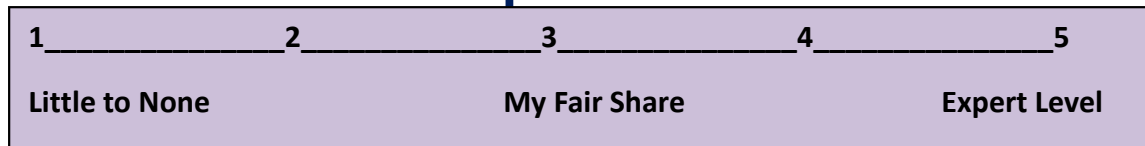
- Where You Need to Use Faciliation

- Your Greatest Strength or Facilitator Quality

- Your Greatest Challenge or Area You Want to Improve

Agenda

- Review of Facilitation Principles
- Apply design Tools to Agenda Development

Setting the Stage

Review of the Basics

3 Basic Principles of Facilitation

- A facilitator is a guide to help people move through a process together, **not** the seat of wisdom and knowledge. That means a facilitator isn't there to give opinions, but to draw out opinions and ideas of the group members.

- Facilitation focuses on HOW people participate in the process of learning or planning, not just on WHAT gets achieved.

- A facilitator is neutral and never takes sides.

- Marya Axner, The Community Toolbox, Kansas University, http://ctb.ku.edu/en/tablecontents/sub_section_main_1154.htm

Content vs. Process

Content - What

- Task(s)
- Subject(s) for discussion.
- Problem(s) being solved.
- Decision(s) made.
- Agenda items.
- Goals and objectives

Process - How

- Methods
- How relations are maintained.
- Tools being used.
- Rules or norms set.
- Group dynamics.
- Climate

Meeting Leader: May offer opinion with intent on influencing the outcome of discussions and decisions.
Facilitator: Remains neutral on the content and focuses on managing process.

– 2008 Ingrid Bens *Facilitation at a Glance*.

Stages of Group Development

Forming

Storming

Norming

Performing

Adjourning
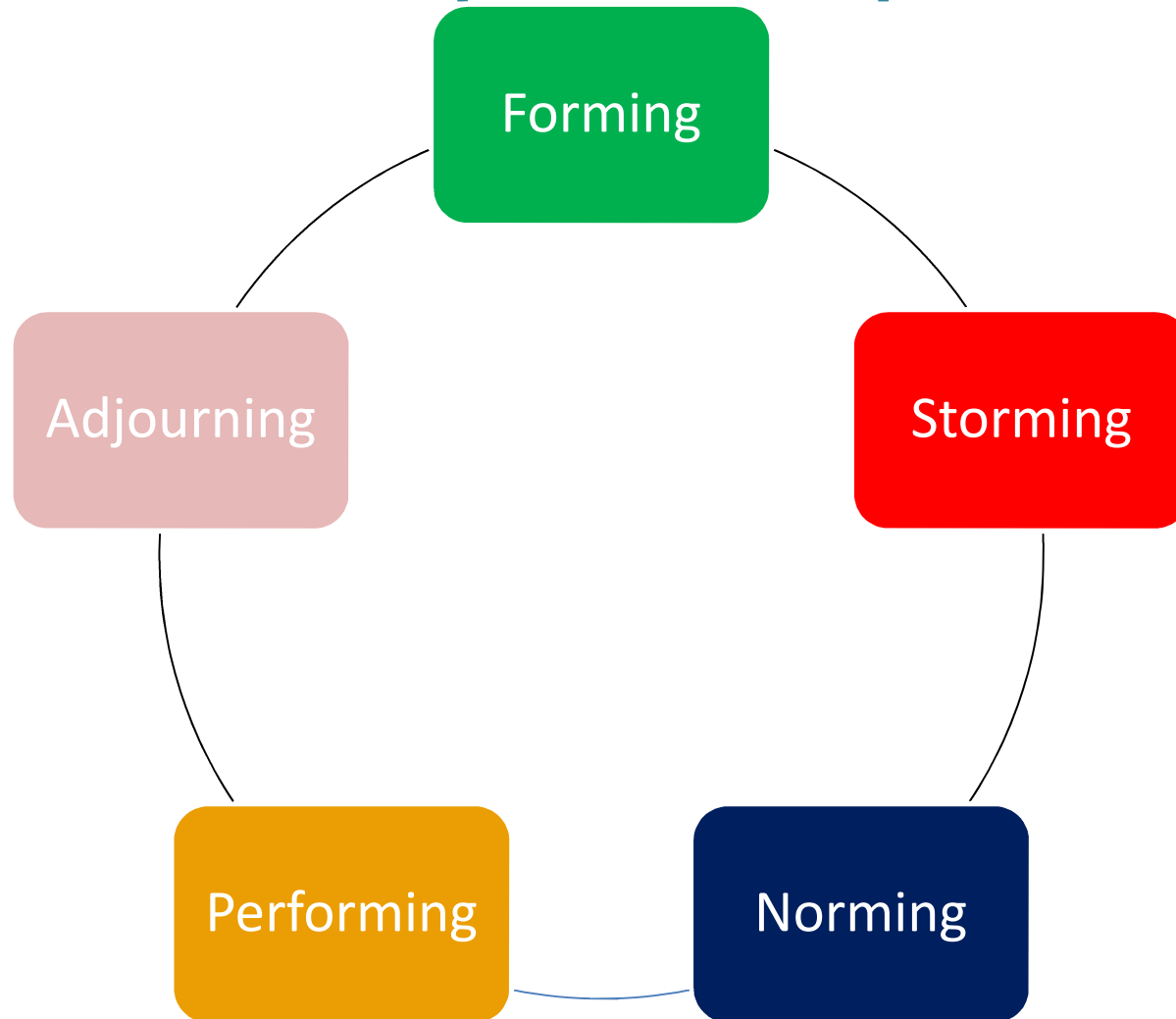
Bruce Tuckman

Good Facilitation vs. Poor Facilitation

- Recall an example of experiencing good facilitation and poor facilitation.

- Share in small groups (5-7 minutes).

- Identify the best example of each with associated characteristics and share with large group.

- Large Group Recorder – Record characteristics/ actions associated with good and poor facilitation.

What does a facilitator do?

Which meeting goals do you have for your upcoming facilitative roles?

7 Types of Meeting Goals

- Share Information
- Advance the Thinking
- Improve Communication / Dynamics
- Build Community
- Build Capacity
- Make Decisions
- Obtain Input

Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

A Successful Facilitator Needs to Negotiate for Success…

- Always negotiate the power you need to work effectively. Neutral on content does not mean neutral on process.

  – Identify the times you feel powerless in facilitation and what you need in those situations.

- Facilitation is a form of leadership by consent.

-2005, Ingrid Bens, *Advanced Facilitation Strategies*.

And Work for Success…

Why do facilitators lose their role?
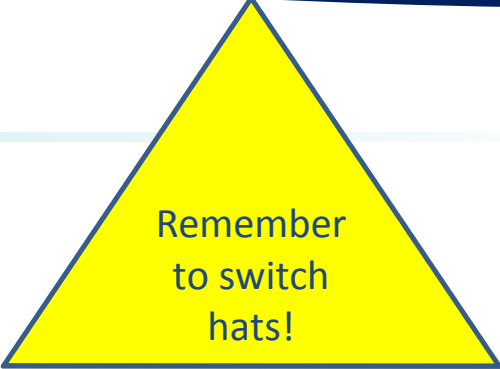(reflect back to your discussions earlier)

- Process designed was based on insufficient or inaccurate information
- Processes not tested; buy-in not there.
- Facilitator skills and experience insufficient for complexity.
- Norms for interaction not set.
- Process not managed by facilitator
- Unintentionally loses neutrality.
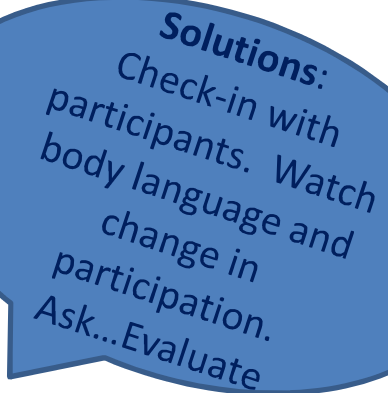
-2005, Ingrid Bens, *Advanced Facilitation Strategies.*

Common Mistakes that Cause Facilitator Loss in Neutrality…

- Changing Members' Words
- Taking Sides
- Asking too Many Leading Questions
- Unconscious Selling
- Not Checking Assumptions
- Answering Content Questions
- Favoring One Person or Side Over Another

Remember to switch hats!

Solutions: Check-in with participants. Watch body language and change in participation. Ask…Evaluate

-2005, Ingrid Bens, *Advanced Facilitation Strategies*.

5 Rules of Facilitation

1. Context, context, context.

2. Keep the purpose crystal clear.

3. Always create a detailed process agenda to guide your work.

4. Don't hesitate to make needed interventions.

5. You are the instrument.

-2005, Ingrid Bens, *Advanced Facilitation Strategies.*

Pre-Facilitation

Assessment and Design

- Gather information about the group and the intended purpose and needs.
- Summarize and verify for accuracy with the leader/key members
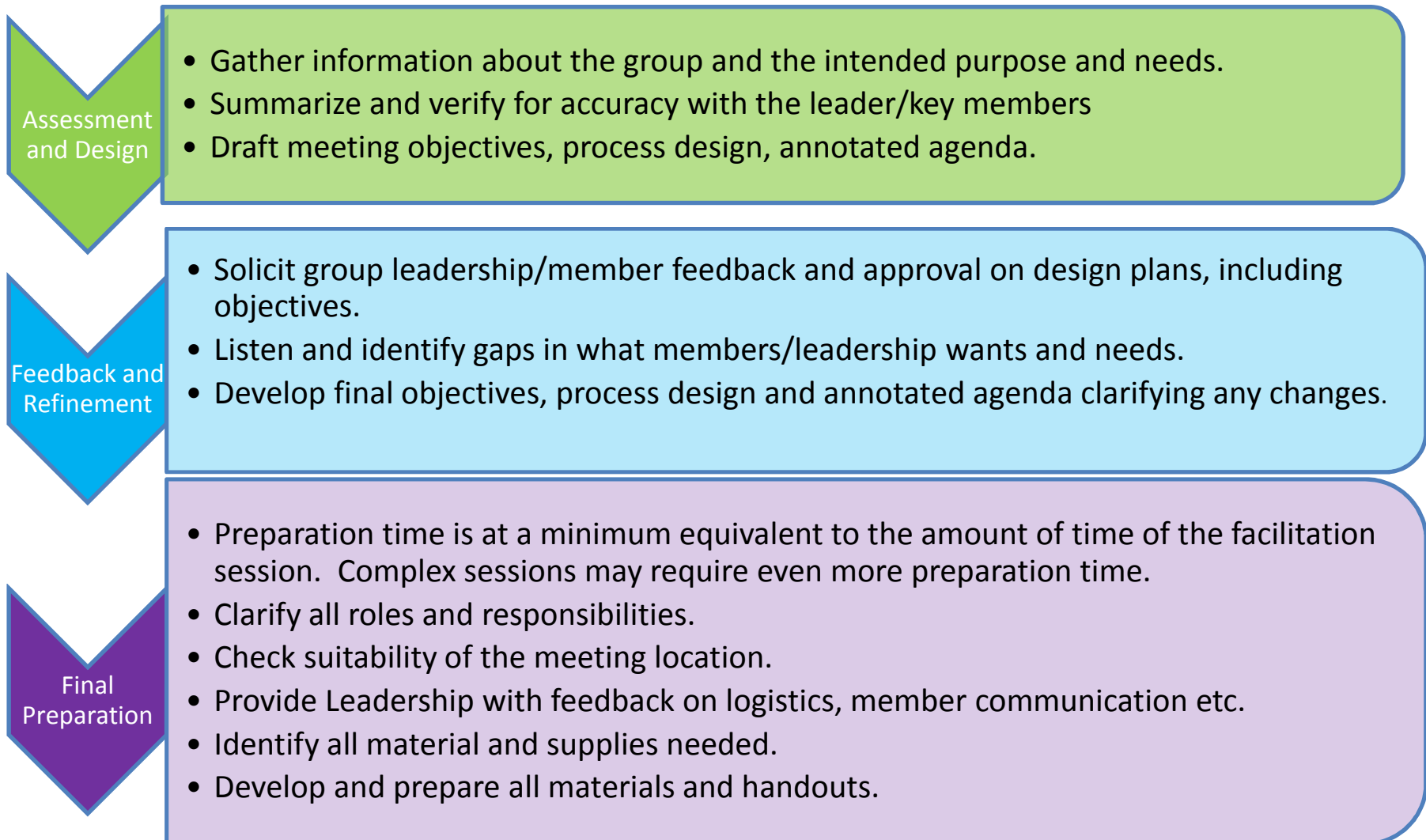- Draft meeting objectives, process design, annotated agenda.

Feedback and Refinement

- Solicit group leadership/member feedback and approval on design plans, including objectives.
- Listen and identify gaps in what members/leadership wants and needs.
- Develop final objectives, process design and annotated agenda clarifying any changes.

Final Preparation

- Preparation time is at a minimum equivalent to the amount of time of the facilitation session. Complex sessions may require even more preparation time.
- Clarify all roles and responsibilities.
- Check suitability of the meeting location.
- Provide Leadership with feedback on logistics, member communication etc.
- Identify all material and supplies needed.
- Develop and prepare all materials and handouts.

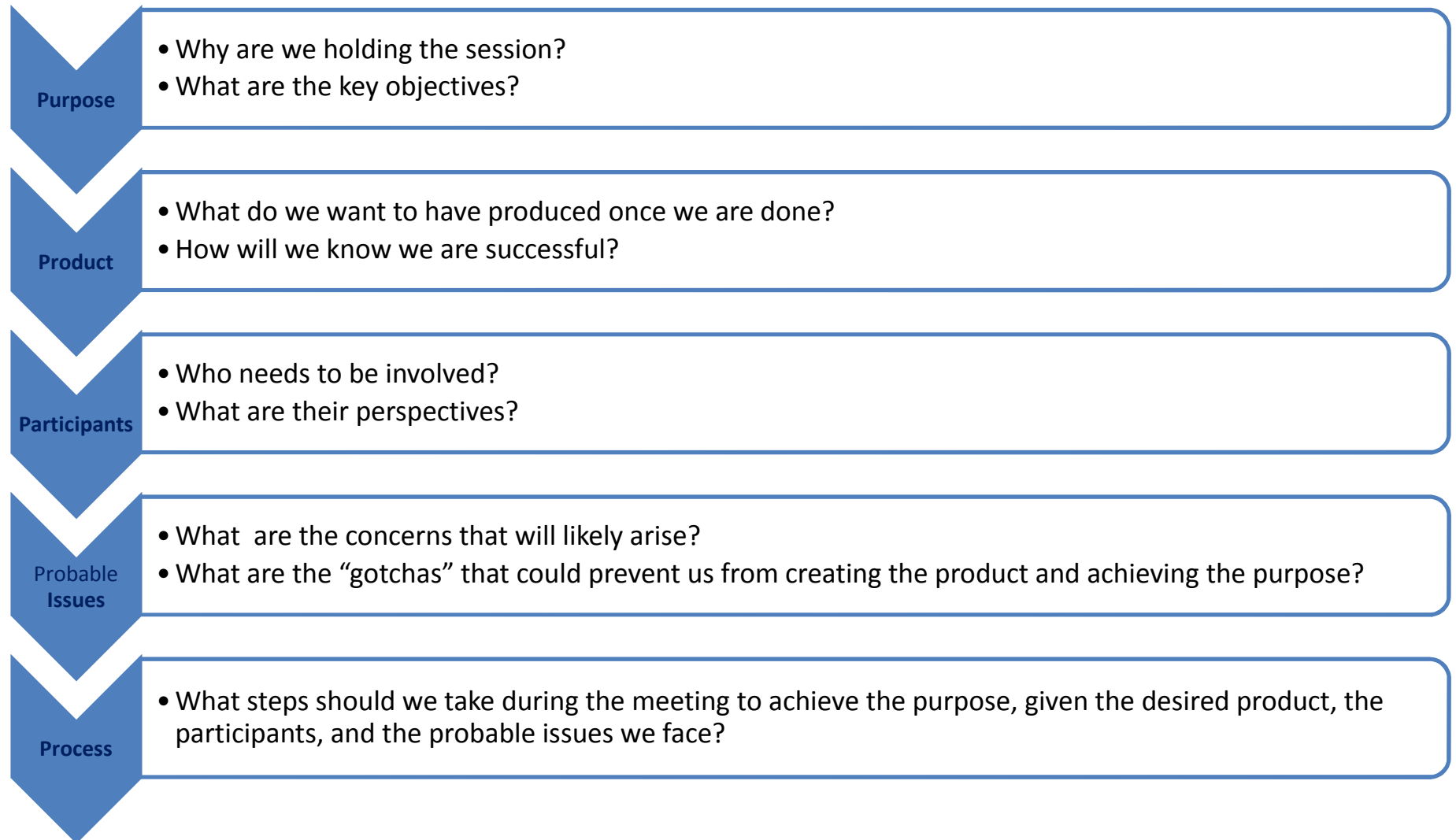# Assessing Needs

1. What's the <u>history</u> of the group and their work?
2. <u>Why</u> does the group feel a need for a <u>facilitator</u>?
3. What does the group need to <u>accomplish? By When?</u>
4. What can you tell me about <u>leadership, members, group dynamics</u> etc.?
5. <u>What do you hope that happen as a result of this meeting</u>?
6. Verify any <u>assumptions </u>you may have.

The 5 P's of Preparation

Purpose
- Why are we holding the session?
- What are the key objectives?

Product
- What do we want to have produced once we are done?
- How will we know we are successful?

Participants
- Who needs to be involved?
- What are their perspectives?

Probable Issues
- What are the concerns that will likely arise?
- What are the "gotchas" that could prevent us from creating the product and achieving the purpose?

Process
- What steps should we take during the meeting to achieve the purpose, given the desired product, the participants, and the probable issues we face?

-Michael Wilkinson, *The Secrets of Facilitation*, 2004.

Planning

- Be clear on where the group has been and where the group needs to go/ what they need to accomplish and by when

- Learn what you can about members

- Design processes to engage all members

- Structure meeting so group does the talking 80-90% of the time

- Identify potential barriers and solutions to overcome

- Give participants a road map.

- For all design….have back up plans!

Agenda Development Guideline

- Overall goal for the group

- Specific objectives and correlating outcomes for this meeting/session that must be met

- Who must attend? Roles?

- What pre-work or information will participants need?

- What type of opener is needed to foster comfort?

- What amount of time for discussion is needed?

- What decisions must be made?

- What is the potential resistance/ issues? Where? Who?

- Are there any special norms that need to be established?

- How will you know you it was successful?

– Adapted from: 2008 Ingrid Bens *Facilitation at a Glance*.

Agenda Design Template

Overall Group Goal:

Session Objectives		Correlating Outcomes	
•		•	
•		•	
•		•	

Members Needed	Role	Specific Needs

Information or Pre-work for Participants (List items/info)	Person Responsible	Target Date

What specific group norms need established?

Norm Needed	Why?	How?	Interventions

What type of Opener is needed? Purpose?

Activity Steps	Person Responsible	Time	Materials

Discussion Items (Consider information sharing needed, planning discussions, problem-solving, relationship building or process and conflict resolution.)

Discussion Items	Purpose/ Outcome Desired	Special Contributors or Reference Material	Time Needed/ % of Meeting

Decision Items (Consider difficulty level and empowerment level.)

Decisions to be Made	Type of Decision Needed	Materials Needed	Time Needed/ % of Meeting

Potential Barriers/ Solutions

Potential Resistance or Barrier	Where?	Who?	Solutions

Measuring Effectiveness

Element to Measure	How? Question?	Method

– Adapted from: 2008 Ingrid Bens *Facilitation at a Glance*.

7 Types of Meeting Goals

Share Information

Advance the Thinking

Obtain Input

Improve Communication / Dynamics

Make Decisions

Build Capacity

Build Community

Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

Designing and Effective Agenda

Topics
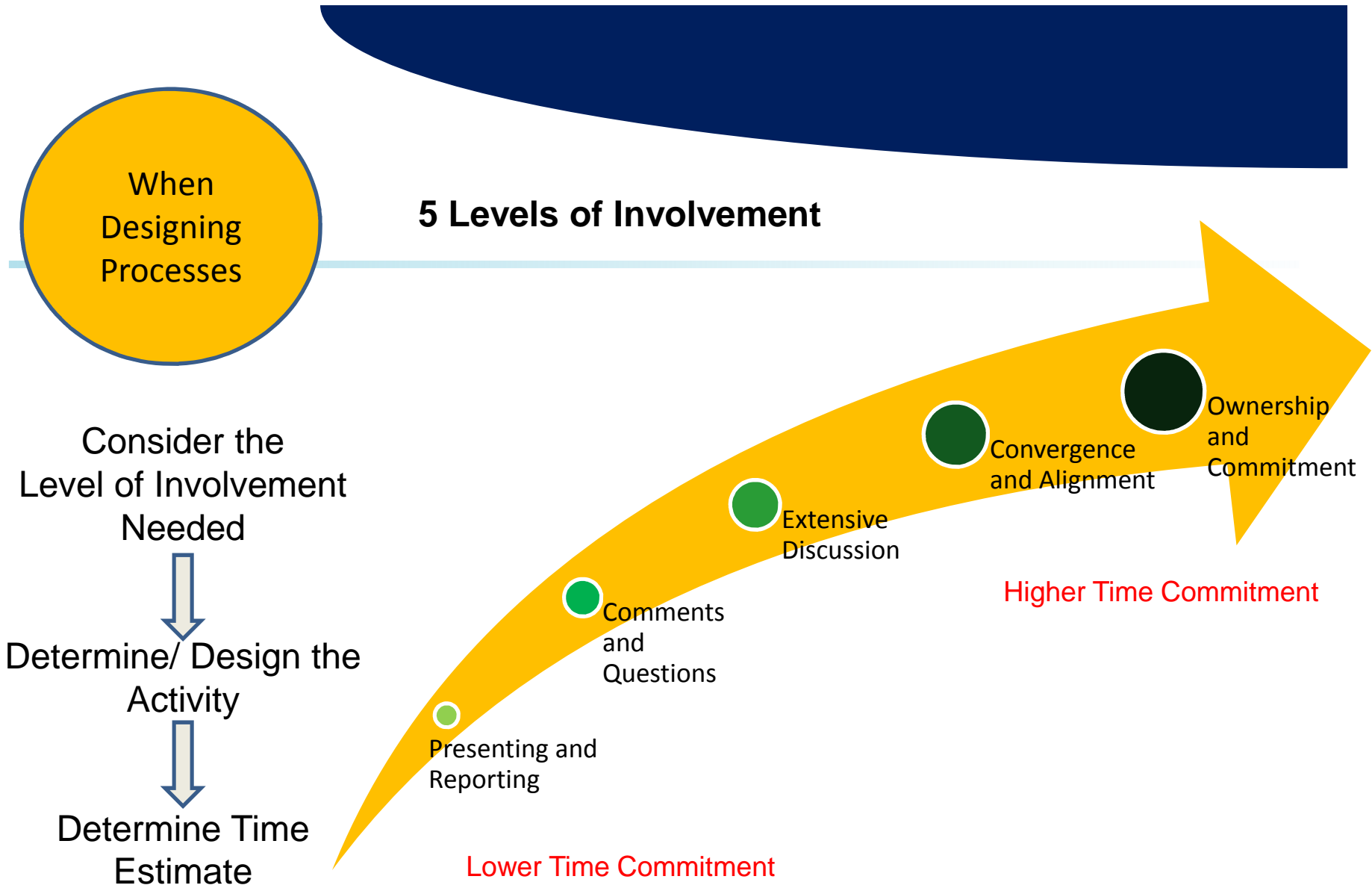- What topics do you need to address?

Outcomes
- For each topic, what outcome do you want to see?

Processes
- What activity(ies) will best support the group to achieve each desired outcome?

Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

When Designing Processes

5 Levels of Involvement

Consider the Level of Involvement Needed

↓

Determine/ Design the Activity

↓

Determine Time Estimate

Ownership and Commitment

Convergence and Alignment

Extensive Discussion

Comments and Questions

Presenting and Reporting

Higher Time Commitment

Lower Time Commitment

Adapted from: Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

Top 10 Ways to Ensure a Bad Agenda

10. Time the agenda right down to the minute and assume the meeting will start exactly on time.

9. Assume that everyone will know what you're trying to accomplish at the meeting and if they don't…they'll ask you.

8. Plan to spend the first half of the meeting prioritizing what to do the second half.

7. Keep the meeting interesting by making sure as many statistics and technical reports are shared in a didactic manner.

6. If you've got an agenda of difficult and important items, improve efficiency by skipping breaks and shortening lunch.

5. When the most important discussion if likely to be emotionally charged, save it for last. Maybe the group will be ready by then and on their way out the door.

4. Since everyone prefers meetings stay on track, assume no one will raise a topic that's not on the agenda.

3. When you know the agenda is too packed, assume the meeting will run overtime….but don't tell anyone in advance.

2. To maintain your flexibility, don't put the agenda in writing.

1. Don't waste time planning an agenda. Things never go the way you expect them to go.

Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

Facilitation

Beginning

- Room set-up is critical. Ensure seating fits group needs. Post materials.
- Greet members and engage with them as much as possible as it helps encourage future participation. Personal connection…
- Introductions, roles, objectives, agenda, process, ask for comments, ground rules, solicit reports/actions from previous, start process and discussion, explain clearly

During

- Ensure that all members participate, manage conflict, keep group focused, keep a positive tone, keep track of discussion , intervene as needed, help members adhere to ground rules, maintain energy level, move through agenda/ discussion/ process
- The 3 P's of Process Checking: check **Pace**, check on the **Process** and take the group **Pulse**
- Periodically summarize the ideas that have developed.

Ending

- Ensure objectives were met, decisions made, and action steps/commitments for member ownership are in place (with names and dates).
- Summarize objectives, decisions and action items.
- Conduct a written evaluation of session and solicit verbal feedback
- Ensure all recorded notes (flipchart s) are in hands of right person to transcribe.
- Determine follow-up date/time/actions.
- Thank participants/ leadership. Make sure they understand and celebrate accomplishments.

The Facilitators Best Tool….Questions

- The ability of the group to respond to a question is significantly affected by the quality of the question the facilitator asks.

    – *The first thing we want to talk about are inputs. What are the inputs to the scheduling process?*

        or

    – *If you were about to develop the clinic staffing schedules, what information would you have to have close by?*

- When you draw a vivid image, participants can almost literally see the answers and can begin responding right away.

    – *Start with an image building phrase such as "Think about…", "Imagine..", "If…" and "Consider…"*

-Michael Wilkinson, *The Secrets of Facilitation*, 2004.

Complete the Chart

The Perception	Non-facilitator Response	Facilitator Response	Question Type and Purpose
You don't think what was said is correct.	*I don't think that is correct.*		
You don't believe everyone understands what is said, but you think you do.	*Let me explain to everyone what he is saying.*		
You don't understand what is said and are not sure anyone else does.	*I don't understand your comment.*		
A potentially suitable solution has been overlooked.	*I think we should…*		
The point does not appear to be relevant to the current discussion.	*That point is irrelevant. Let's move on.*		
The group has stalled.	*Let's move on to the next topic.*		

The Perception	Non-facilitator Response	Facilitator Response	Question Type and Purpose
You don't think what was said is correct.	*I don't think that is correct.*	*Why is that important?*	**Direct Probe** to Challenge
You don't believe everyone understands what is said, but you think you do.	*Let me explain to everyone what he is saying.*	*It sounds like what you're saying is…Is that right?*	**Playback Question** to clarify what you believe you know
You don't understand what is said and are not sure anyone else does.	*I don't understand your comment.*	*Is that important because…?*	**Indirect Probe** to provide a way for the participant to clarify
A potentially suitable solution has been overlooked.	*I think we should…*	*Are there solutions in the area of…?*	**Leading Question** to seek other solutions
The point does not appear to be relevant to the current discussion.	*That point is irrelevant. Let's move on.*	*That's a good point. Can we put that on the Issues list so we won't forget it, and then get back to…..?*	**Redirection Question** to get the conversation back on track
The group has stalled.	*Let's move on to the next topic.*	*When have covered (a), (b), (c),…What else might we do to improve the hiring process?*	**Prompt Question** to help keep the group moving

-Michael Wilkinson, *The Secrets of Facilitation*, 2004.

Facilitation Process Tools

- Visioning
- Brainstorming
- Affinity Diagramming
- Root-Cause Analysis
- Forcefield Analysis
- Multi-Voting
- Polling
- Small Group Work
- Individual Work
- More and more and more….

When do you use these process tools?

What to Record

- Any decisions made

- Actions assigned during the meeting

- Outstanding issues that surfaced

- Key/ relevant comments and analysis

How to Record

- Write first, discuss second (see next slide)

- Write what they said, not what you heard

- Write so the group can read it

- Ask don't tell (before you make a change)

- Offer/create a template for responses

- Record only as many words as necessary

- Use common abbreviations

-Michael Wilkinson, *The Secrets of Facilitation*, 2004.

Post Facilitation

Assessment and Design

- Always follow-up no matter how formal or informal the session. After there has been some time for settling, you want to check-in to ask the extent to which the session helped with the group progress and effectiveness.
- For many sessions, especially larger, encourage the leader to follow-up with participants as well by sharing results of evaluations and soliciting additional feedback as appropriate.
- If you agreed to a follow-up activity, you will proceed with a report or other actions. It is a good idea to set up in advance this responsibility for the leader/group to assume responsibility for implementation of actions from the session.
- Some sessions may even require a follow-up meeting to discuss progress and further evaluate effectiveness and plan next steps.

– 2008 Ingrid Bens *Facilitation at a Glance.*

Putting Your Skills to Work

Handling Challenging Members and Issues Effectively

The cycle (clockwise from top):

Describe behavior. Test. → Share inference. Test. → Whether and how to change behavior. Test. → Observe → Infer meaning → Intervene? How and Why? → Describe behavior. Test.
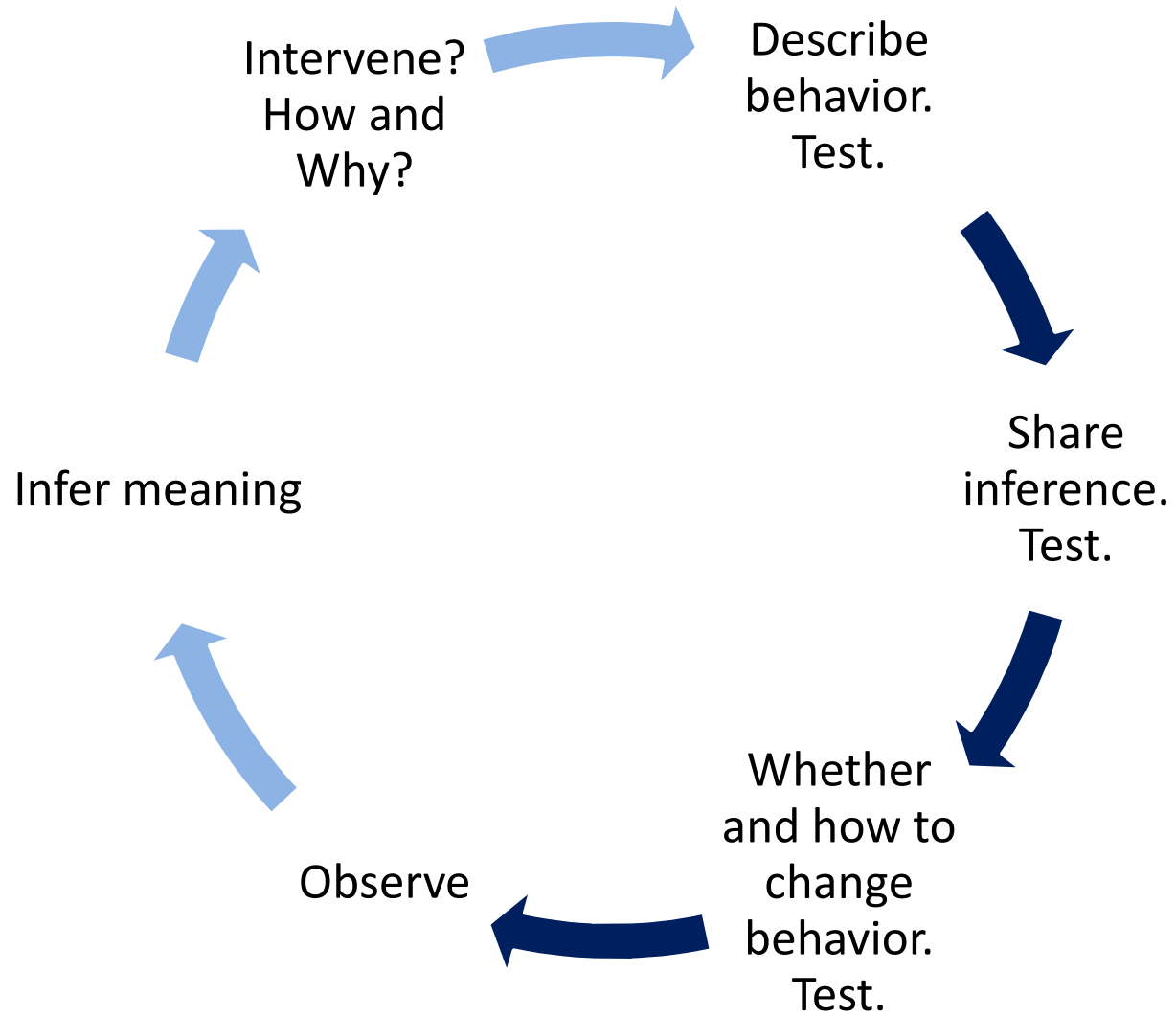
2002, Roger Schwarz, *The Skilled Facilitator New and Revised.*

Deciding Whether or Not to Intervene

- Is the problem serious?

- Might it go away by itself?

- How much disruption will intervening cause?

- How will it impact relationships?

- Will it damage anyone's self esteem?

- What's the chance of it working?

- Do I have enough credibility?

- Is it appropriate to intervene given their level of openness and trust?

What will happen if I do nothing?

If the answer is the group will be less effective, then you must intervene.

– 2008 Ingrid Bens *Facilitation at a Glance.*

Facilitation Intervention Wording

- Describe what you see

  I'm noticing…..

- Make an impact statement

  I'm concerned…

- Redirect ineffective behavior by telling or asking

  Would you please…?

  What needs to be done…?

What are some common types of challenging members?

- Dominator
- Self-proclaimed expert
- Late to arrive/ Early to Depart
- Non Participatory
- Private Participant (only with neighbors)
- Storyteller
- Naysayer
- Constant Devil's Advocate
- Busy Person/ Not Focused on Meeting at hand
- Inappropriate (comments, attacks, etc.)

Overcoming Challenging Behaviors

Behavior	Intervention
Dominator	
Self-proclaimed Expert	
Late to Arrive/ Early to Depart	
Non-Participatory	
Private Participant (only with Neighbors)	
Storyteller	
Naysayer	
Constant Devil's Advocate	
Busy Person/ Not Focused on Meeting at hand	
Inappropriate (comments, attacks etc.)	

Fostering Mutual Understanding

Use this technique when you need to promote understanding of various view points, not to resolve conflict/ differences….

- ✓ Identify or ask for one volunteer to be the "focal person". Give them 3 minutes to speak and allow them to begin with, "Here's the point I am trying to make…"

- ✓ When the focal person finishes, someone should ask, "What did you mean by…?", or "Can you explain why…?" or something similar.

- ✓ Allow focal person to respond.

- ✓ Ask the questioner, "Is that clear to you now?" If not, have them state what is unclear and allow the focal person to respond.

- ✓ When both the focal person and questioner feel understood, ask for another questioner.

- ✓ After 3 or 4 people have had a chance to ask questions, ask for a new volunteer for a focal person.

Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

Using Reframing to Overcome Negative Group Culture

Perceived Problem	Reframed Problem
Them	Us
Problem	Opportunity
Our goal is unachievable.	We need to break out goal down into realistic steps.
They won't buy it.	We need to identify the value for them.
We don't have enough resources.	We can use the resources we have better. Let's identify waste.
We need to gather more input.	Let's take a critical look at the input we are already
The people working on it are doing a terrible job.	The people working on it may not have the time to do a quality job
We don't have enough money.	We haven't figured out how to find new sources of money.
The group just can't get along.	The group hasn't made a commitment to work through the issues they have.
We don't have any power in this system/ community.	We haven't found our leverage points in the system/ community.
We don't have enough time to do all these things.	We need to decide what to do now and what to do later…prioritize actions.

Adapted from: Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

Other Re-framing Ideas

- "What's unchangeable about this problem?" Based on list, identify an aspects that may be changeable after all.

- Identify Key Words that lead to assumptions. Challenge the assumptions.

- Reversing Assumptions about a problem.

- Removing constraints

- Re-centering the cause

- Worst case scenario....

Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

Put Prevention to Work…

- Identify potential issues and dysfunctions with leaders and key members

- Assign seats or small groups

- Add ground rules (see next slide)

- Interact with particular members

- Pay close attention to particular members' reactions

- Hold informal meetings during breaks

-Michael Wilkinson, *The Secrets of Facilitation*, 2004.

Adding Ground Rules to Prevent Dysfunction

Potential Issue	Possible Ground Rule
Participants like to discuss at a high level but seldom get to the real issues.	Address root causes, not symptoms.
Arguments occur because people assume they understand when they don't.	Playback and confirm before stating disagreement
People stay silent rather than voice their disagreement.	Poll for consensus on all major decisions.
Participants tend to waste time tearing down alternatives rather than seeking solutions.	Comment only on strengths or make suggestions to improve.
Meetings end without a clear understanding of what was decided or what happens next.	Reserve 15 minutes for review and action planning

-Michael Wilkinson, *The Secrets of Facilitation*, 2004.

Early Warning Signs…

When People are Engaged	When People are Not Engaged
Involvement in discussion	Low involvement in discussion
Words of encouragement	Complaints, objections
Laughs, smiles, head nods	Frowns, head shakes, nothing
Bodies leaning and legs crossed, toward the center of the room	Bodies leaning and legs crossed away from the center of the room

Look for:
• Participants who are not speaking.
• Participants who complain or object publicly to the group or privately to a neighbor in side conversations
• Participants whose outward expressions seem to indicate that they are not buying in
• Participants whose body language seems to indicate uneasiness.
• Changes in communication patterns and dynamics.

-Michael Wilkinson, *The Secrets of Facilitation*, 2004.

Managing Dysfunction

- Reward Functional Behavior with attention, head nods, smiles, the floor when asked and comment at breaks on their participation.

- Focus on Prevention

- Detect Problems Early

- Go for a Clean Resolution by
  - approaching person privately or generally,
  - empathize with the symptom,
  - address the root cause,
  - get agreement on a solution.

-Michael Wilkinson, *The Secrets of Facilitation*, 2004.

Tips

- Timing matters…deal with the behavior as soon as you recognize it and timing works.

- During each break, address remaining issues.

- If problem is severe, call an early break.

- Avoid public corrections, getting angry or emotional and losing objectivity or neutrality.

- Continue to monitor

-Michael Wilkinson, *The Secrets of Facilitation*, 2004.

Dealing with Resistance

- Invite the resistor to express their rationale for resistance while you listen.

   Tell me why you feel this way.

   What happened last time?

   Help me understand the facts of the situation.

- After concerns have been acknowledged, ask questions to prompt the resistor to suggest solutions to barriers

   What would make you change your mind?

   What assurance will eliminate your concerns?

   ports will enable you to continue?

   – 2008 Ingrid *What sup* Bens *Facilitation at a Glance.*

Break into Small Groups

Ask members to suspend judgments

Step out of content and talk about the process

Switch to structured go-rounds

Switch to brainstorming

Group Interventions for Difficult Communication Styles

Encourage more people to contribute to discussion

Switch to individual writing

Encourage members to deal with unfinished business

Educate members about group dynamics

Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

Decision-Making Methods

- Majority Rule
- Supermajority
- Simple Concensus
- Five Finger Consensus

Decision-Making

- Consensus Building

- Multi-voting

- Compromising

- Majority Voting

- One Person Decides

- Supermajority

1	2	3	4	5	6	7	8
Whole-hearted Endorsement	Agreement with a Minor Point of Contention	Support with Reservations	Abstain	More Discussion Needed	Don't Like But Will Support	Serious Disagreement	Veto
"I really like it."	*"Not Perfect but it's good enough"*	*"I can live with it."*	*"This issue does not affect me."*	*"I don't understand the issues well enough yet."*	*"It's not great, but I don't want to hold up the group."*	*"I am not on board with this…don't count on me."*	*"I block this proposal."*

Source for Gradients of Agreement: Sam Kaner, Duane Berger and Staff of Community At Work, 1987.

Source: M. Doyle and D. Straus, *Making Meetings Work* (New York: Berkeley Books, 1993

Methods for Polling

- Show of Hands

- Human Line Continuum

- Pick One and Say Why

- Simultaneous Score/Vote

- Secret Ballot (post results)

- Preliminary Poll…Discussion…Final Poll

- Small Group Sharing/ Consensus

Adapted from : Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

When do you need enthusiastic support (buy-in/ ownership)?

High Stakes · Long-Term Impact · Tough Problem · High Investment · High Autonomy
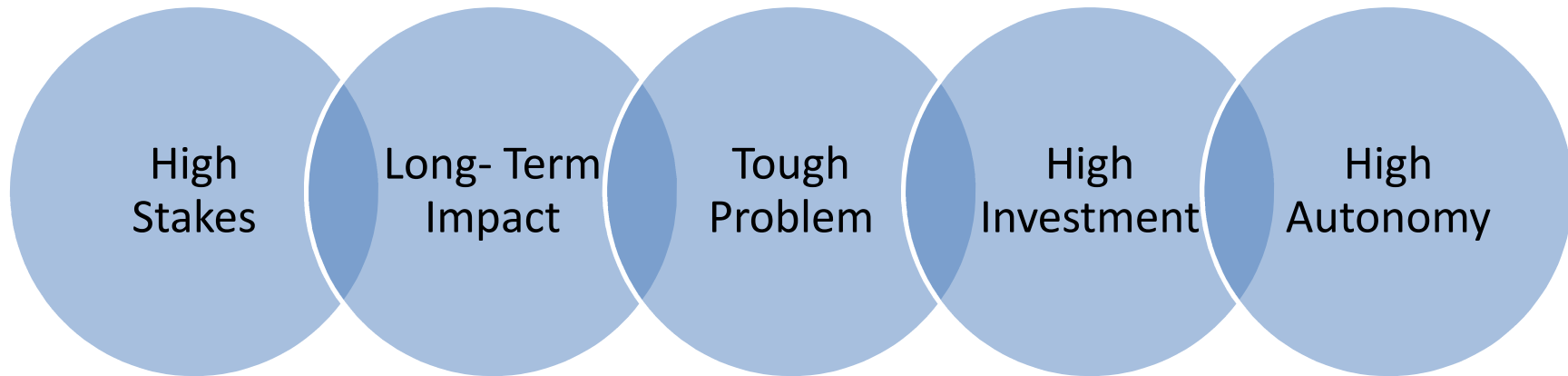
When is lukewarm support good enough?
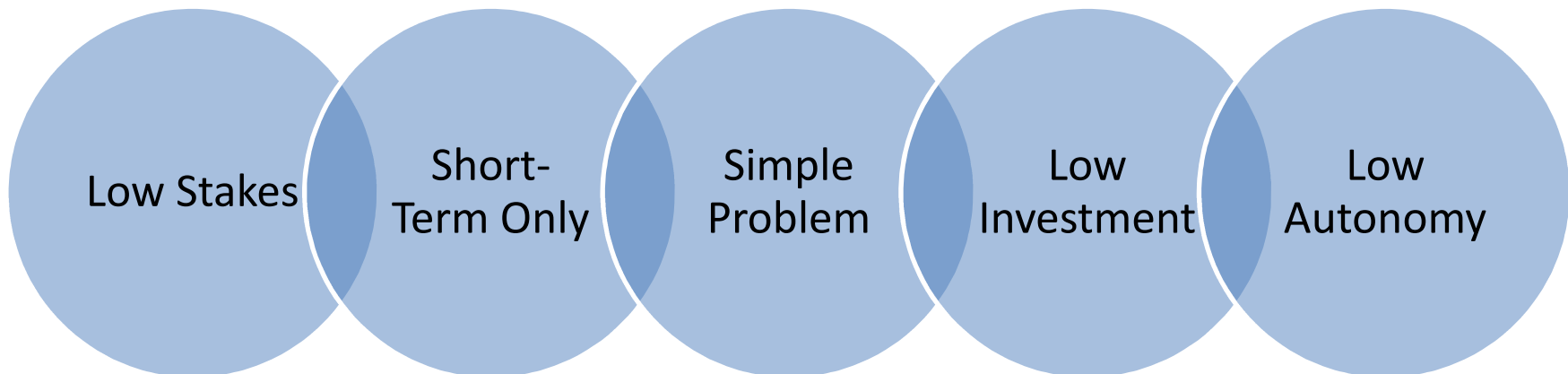
Low Stakes · Short-Term Only · Simple Problem · Low Investment · Low Autonomy

Adapted from : Community at Work 2007, Sam Kaner, *Facilitators Guide to Participatory Decision Making,* 2nd Ed.

Consensus

I can live with it and I will support it.

Monitoring and Measuring the Facilitative and Group Process

Evaluation Tools to Measure Group Satisfaction and Effectiveness

Process Evaluation Tools

- Don't just wait until the end to evaluate and find out that you are on or off track.
- Use quick pulse check surveys for periodic feedback.

1	2	3	4	5

Assign descriptors to each value.

Progress: *To what extent are we achieving our goals?*

Pace: *How does the pace feel?*

Process: Are we using the right methods/tools?

Pulse: *How are you feeling about the session?*

Informal Group Evaluation

What were the strengths of today's meeting? +	What were the weaknesses of today's meeting? —	What should we do to improve the weaknesses? What else do you need? *Rx*

You can use this a few different ways:
- in a large group on flipchart and solicit feedback
- Post flipcharts and have people complete as they exit (post in different places)
- As a written survey.

Best used as large group discussion tool.

Meeting Effectiveness Evaluation

Please use a scale from 1-5 for each item.
1= not very effective and 5= to a great extent. (Rating of 5 is best)

		1	2	3	4	5
Commitment to the Group	To what extent was I committed to helping to achieve the group's goals for this meeting?					
Clear Goals	To what extent were the goals clear for this meeting?					
Communication	To what extent was the discussion open, with sharing of diverse ideas and perspectives?					
Participation	To what extent did I say or contribute what I thought was important to achieving our goals for this meeting?					
Effectiveness	Overall, how effective was the group in meeting its goals during this meeting?					
Value	How valuable were this meeting's goals compared to other things that we as a committee need to accomplish?					
Satisfaction	Overall, how satisfied were you with today's meeting?					

Additional Comments:

_____

_____

MarMason Consulting

Meeting Exit Survey

- Suggest using a 5 pt likert scale ratings of poor, fair, satisfactory, good and excellent or some other clear descriptors.
  - Output: How well did we achieve what we needed to?
  - Use of Time: How well did we use our time?
  - Participation: How well did we ensure everyone was equally involved?
  - Decision Making: How well-thought out were our decisions?
  - Action Plans: How clear and doable are our actions plans?
  - Organization: How well run was the meeting?
  - Meeting Objectives – Are there clear objectives for each meeting topic?
  - Communication – Are agendas circulated in advance of the meeting?

- Start Times – Do meetings start on time?

- Time Limits – Are time limits set for each agenda item?

- Meeting Review – Are action items from the previous meeting(s) brought forward?

- Warm-up – Is there a meeting warm-up to hear from all members?

- Role Clarity – Are roles made clear?

- Setting – Is the meeting place conducive to our working?

- Process – Is there clarity before each topic as to how that item will be managed?

- Preparation – Have people done their homework?

- Interruptions – Are they managed well?
- Participation – Are all members fully exchanging views, taking responsibility for action items and follow-up?
- Leadership – Do a few people make all decisions, or is there a sharing of authority?
- Pace – Is the pace either too fast or too slow, or is it just right?
- Tracking – Do meetings stay on track and follow the agenda?
- Record Keeping – Are quality minutes kept and circulated?
- Listening- Do members practice active listening?
- Conflict Management – Are differences of opinion suppressed or is conflict effectively used?
- Decision Making – Does the group generally make good decisions?
- Closure – Do we end our meetings with clear next steps?

– 2008 Ingrid Bens *Facilitation at a Glance*.

Outcome Evaluation

- Were objectives met? How well?

- What was result of objectives being met?

Bibliography and Suggested Resources

- *Advanced Facilitation Strategies,* Ingrid Bens and John Wiley & Sons, Inc., 2005.

- *Facilitation at a Glance*, 2nd Edition, Ingrid Bens and Goal/QPC, 2008. (To order 800.643.4316 or service@goalqpc.com)

- *Facilitators Guide to Participatory Decision-Making*, 2nd Edition, Sam Kaner, 2007.

- *The Secrets of Facilitation,* Michael Wilkinson, 2004.

- *The Skilled Facilitator New and Revised,* Roger Schwarz, 2002.

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