

Welcome to the Facilitation Skills Practice Workshop!

Now that you have completed the facilitation skills online program, it's vitally important that you have the opportunity to practice in a group setting.

This session has been designed to provide you with the experience of using facilitation tools and techniques to lead a small group discussion. This workshop design will also ensure that you receive specific feedback from your facilitator colleagues about how you can become even more effective in using facilitation to manage meetings.

This workshop is totally experiential. It features a warm-up exercise, and a demonstration session by the workshop leader, as well as six 20 minute facilitation practice sessions. Each practice is followed by a 15 minute feedback session. During this time, each facilitator will received specific input on what they did well and what they can do to become even more effective.

This workshop has been designed for small groups of six. During each practice round, one person will act as the facilitator, one person will act as the coach and the remaining four individuals will act as group members. These roles will rotate during the workshop.

The objectives of this workshop are:

- To review the core skills of the facilitator.
- To help you build your skills through hands-on practice leading a group discussion.
- To help you gain experience using a variety of process tools.
- To provide you with specific suggestions that will help further improve your facilitation skills.

Workshop Design

This workshop has been designed to provide learners who have completed the online course with the hands-on experience of leading a small group discussion. The most important components of this course are the practice sessions. Each workshop participant will have the opportunity of leading a twenty-minute discussion. During each facilitated conversation, one member of the workshop group will be serving as the coach. The roles of facilitator, coach and group members will rotate throughout the day.

The Coaching Role

When it's your turn to be the coach, you will seat yourself away from the group in order to be as unobtrusive as possible. You will not take part in the conversation. Your total attention will be on observing the facilitator and making detailed notes about what he or she does well, or could do in the future to be more effective.

Coaches should avoid direct eye contact with the facilitator and maintain neutral body language. This calls for a poker face, since looking like you disapprove can undermine the facilitator.

The coach will be given an observation sheet. On the left hand side will be a list of best practices to check off as they occur. Use the blank space on the right to make detailed notes about what happened and how the facilitator handled each situation. Here are some examples of effective coaching notes:

- Two people talked over each other – you stopped the action and said: *“I’m concerned that you are both talking at once and that you may not hear each other. I need you to let each other finish before interjecting.”*
- At the halfway point you stopped the action and took the pulse of the group to see if anyone was lost or if the pace was ok.

At the end of each facilitation session, there will be a feedback session in which the facilitator will receive feedback about how they did. In this session, coaches speak after the other group members and then give their written notes to the facilitator.

Facilitation Skills Practice Workshop Agenda

- Welcome, Introductions, Objectives and Agenda Overview
- Facilitation Partner Practice
- Facilitation Skills Demonstration Session and Debrief
- Break

- Facilitation Practice Session #1
- Feedback Session #1
- Facilitation Practice Session #2
- Feedback Session #2

- Lunch

- Facilitation Practice Session #3
- Feedback Session #3
- Facilitation Practice Session #4
- Feedback Session #4

- Break

- Facilitation Practice Session #5
- Feedback Session #5
- Facilitation Practice Session #6
- Feedback Session #6

- Personal Learning Reflection and Report-Out
- Workshop Evaluation and Adjournment

Facilitation Skills Partner Practice

The first activity of the workshop is a warm-up activity conducted in pairs. This exercise provides an opportunity for everyone to use the five core facilitation tools with a partner.

Steps:

1. Find a partner. One of you will be Person A and the other will be Person B.
2. You will play these roles for 6 minutes without switching.
3. Then you will switch roles for a second six minute round.

Person A – When it is your turn to play Person A you will assume the content role and answers the following questions:

- What makes some meetings really effective and worthwhile?
- Why are other meetings frustrating and a waste of time?
- What specific challenges do you expect to encounter when facilitating?

Person B – When it is your turn to play the process role:

- **Stay neutral** – Don't add your thoughts or try to control the outcome of the conversation.
- **Listen actively** – Face the speaker, make eye contact, listen to understand more than judge.
- **Ask questions** – Probe, clarify and encourage the other person to say more and dig deeper.
- **Paraphrase key ideas** – Periodically repeat what the other person is saying to make sure key ideas are being understood.
- **Summarize** – Use the last half-minute to give the speaker a brief summary of what they've been saying.

Facilitation Demonstration Session

Look over the list of effective facilitator practices below. Use this checklist to guide your observations during the facilitation demonstration session. Make notes about specific incidents and how the facilitator handled these.

Clarifies the purpose

Establishes the process

Sets timeframes

Stays neutral on content

Paraphrases continuously

Asks good probing questions

Makes accurate notes

Acts lively and positive

Summarizes periodically

Makes suggestions neutrally

Encourages participation

Intervenes when necessary

Maintains a good pace

Conducts process checks

Moves smoothly to new topics

Tests consensus

Ends with a summary

Facilitation Practice Session #1

Topic: Developing *Behavioral Norms* or Meeting Guidelines

All group discussions need to be guided by a set of *Behavioral Norms* or *Meeting Guidelines*. These are rules created by the members that they agree to abide by during discussions.

Norms are most powerful when everyone in the group is fully committed to them. For this reason, norm discussions are always decision-making in nature.

The job of the facilitator in this practice session is, therefore, to help group members through a decision-making discussion in which ideas are ping-ponged around the table before they are recorded. This will help to ensure that all opinions have been heard and that every one can live with the results.

Once a set of *norms* has been created, they will be posted and will be used to guide all discussions that are held throughout the day long workshop.

After conducting a *Start Sequence*, the facilitator leads a discussion based on the following four questions:

1. **What rules of conduct do we wish to follow at our table during this workshop?**
2. **At this workshop, how do we ensure that everyone participates and no one dominates?**
3. **What should we do if at any point a discussion gets stuck or starts to spin in circles? What do we do if we go off track?**
4. **What should we do if we have differences of opinion or discussions become heated?**

Facilitation Practice #1 - Observation Sheet

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Facilitation Practice Session #2

Topic: Using *Force Field Analysis* to explore the forces at work in any situation, process or project.

One of the most foundational process tools is *Forcefield Analysis*. *Force Field Analysis* allows for a systematic analysis of the forces for and the forces against in any situation.

It has a myriad of variations and applications, such as pros and cons, helps and hinders, opportunities and obstacles, strengths and weaknesses and so forth. Discussions are non-decision making, since multi-voting will be used after the discussion to rank the items.

After conducting a *Start Sequence*, the facilitator will engage the group in a discussion of the driving forces and also the challenges inherent in implementing any complex project or activity. Note that the items on one list do not typically repeat on the other list.

Things that support success: strengths, opportunities, etc.	Things that hinder success: challenges, obstacles, etc.

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Facilitation Practice Session #3

Topic: Using the first step in the *Systematic Problem Solving Model* to create a *Problem Statement*.

One of the most important process tools is *Systematic Problem Solving*. *SPS* is a linked series of steps that is used to go from having a problem to implementing solutions.

We are going to explore selected steps in this process during this workshop since *SPS* is central to all process improvement efforts.

After conducting a *Start Sequence*, the facilitator will help group members select one of the issues in the right hand column of the Forcefield Analysis. Avoid selecting a problem that is overly huge or fuzzy. This model works best when members select a problem that is more contained and at least partially within their control. This discussion will result in an outcome all can live with, so there is a decision-making element in the session.

Here are some possible approaches to this exercise:

1. The facilitator helps the group select a problem to work on.
2. Some time is allowed for each person to write down the key words that need to be in a problem statement.
3. The facilitator records these key words on the flip chart.
4. Each person then writes their version of the problem statement.
5. Problem statements are read aloud. If one stands out it's recorded on the flip chart. If none stand out, the facilitator helps members edit the various statements into one that all can accept.
6. The facilitator checks with each person to ensure that the final statement is acceptable.

Record the Problem Statement:

Facilitation Practice #3 - Observation Sheet

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Facilitation Practice Session #4

Topic: Using the *Analyze* step in the *Systematic Problem Solving Model* to gain a shared understanding of the selected problem.

The key step in the *Systematic Problem Solving Model* is the step in which group members analyze the current situation to gain a shared understanding of the current situation.

This step was created to overcome the all too common pitfall of group members jumping to conclusions without a thorough understanding of the issue. In this step, solutions are not accepted. People are asked to hold their improvement ideas until the next step.

After conducting a *Start Sequence*, the facilitator basically asks the members of the group to tell them the story of the problem. The facilitator then asks probing questions to encourage the members to dig deeper and explore the underlying causes of observed symptoms.

This thoughtful conversation is a non-decision-making discussion, in which people build on each other's ideas to create a full picture of the problem so that even an outsider would understand it fully.

Questions useful in analyzing a problem include:

- Describe the problem to me in detail; what is it?
- How does it manifest itself? What are the noticeable signs?
- If I were affected by the problem, what would I notice?
- Describe any steps, sequences or stages?
- What causes the problem to occur?
- What contributes to it?
- Who contributes to it?
- Who is affected by it?
- What other problems does it cause?
- What stops you from solving it?

Facilitation Practice #4 - Observation Sheet

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Establishes the process

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Moves smoothly to new topics

Tests consensus

Ends with a summary

Facilitation Practice Session #5

Topic: Use *Brainstorming* to generate a wide range of possible solutions to problem, as it is now understood.

Once the group has an expanded and shared understanding of the problem situation, the next step is to generate members in identifying a broad range of solutions.

To overcome the common pitfall of people pushing their favorite ideas and arguing, facilitation pioneers invented a technique called *Brainstorming*. This is a non-decision-making discussion. Ideas are called out and recorded with a minimum of wordsmithing. This is to keep people from becoming attached to any single idea and, of course, to keep ideas flowing.

When everyone is engaged in adding ideas to the mix, they feel heard and engaged. This creates a sense of collaboration.

Here are the rules of *Brainstorming* to review during the Start Sequence:

- ✓Let ideas flow freely.
- ✓No debating or evaluating of ideas until later.
- ✓Build on the ideas of others.
- ✓Think in new ways; break out of old patterns.
- ✓Be humorous and creative.

Most people don't know that there are two steps in *Brainstorming*:

Step 1 – Let the ideas flow and try to keep up with recording.

Step 2 - When the flow of ideas slows, the facilitator asks questions like: “What if money were no object? What if you owned this company? What would the customer suggest? What's the most innovative thing we could do?”

Facilitation Practice #5 - Observation Sheet

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Summarizes periodically

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Encourages participation

Intervenes when necessary

Maintains a good pace

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Moves smoothly to new topics

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Facilitation Practice Session #6

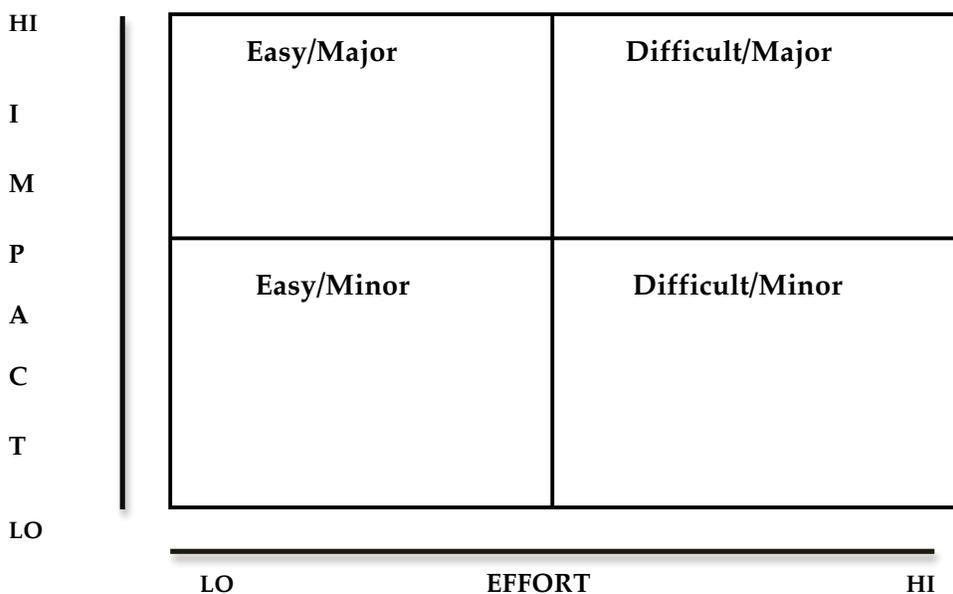
Topic: Using the *Evaluate Solutions* step in the *Systematic Problem Solving Model* to sort the *Brainstormed* ideas.

Once your group has identified a wide range of potential solutions, they need to be sorted so that action steps can be identified. While multi-voting can be used, in this workshop, we will be using a tool called an *Impact/Effort Grid*.

This will be a decision-making conversation, in which the group members must reach consensus about whether or not each idea on the *Brainstorm* list is easy or difficult to implement, and whether it will have a major impact or a minor impact on resolving the problem.

It's very important for the facilitator to help the group members define the terms *easy* and *difficult* and also *minor* and *major* so that everyone is operating with the same frame of reference.

Once solutions have been placed on the grid, review their placement to ensure consensus. This is a great tool, but be aware that it requires the ability to manage differing opinions.



Facilitation Practice #6 - Observation Sheet

Clarifies the purpose

Establishes the process

Sets timeframes

Stays neutral on content

Paraphrases continuously

Asks good probing questions

Makes accurate notes

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Personal Learning Reflections

Thinking about today, identify some of the things that you know that you are doing well as a facilitator?

Based on the feedback that you received today, what are some of the specific tools, techniques or personal behaviors that you would like to make the focus of your personal improvement plan?

What will you do in the weeks and months ahead to find opportunities to practice and further build your skills?