

Planning for Facilitation—Thinking and Conversation Guide

Preparing to Facilitate

Consulting conversation before facilitating a group:

Clarify

- Task, Purpose, and Outcomes
- What makes this topic important?
- What are expected products? Assess feasibility.
- Length of meeting
- Who are the group members and their relationship to each other and the topic?
- Contextual opportunities and constraints
- Group dynamics and interaction patterns
- Group development goals
- Preferred or suggested processes
- What working agreements live within the group?
- Room arrangements; materials needed

Facilitating the Group

Opening

- Audience Connect—relationship/rapport and credibility
 - Greeting and introduce self and your connection to the group and topic
- Role Clarification and Framing the Work
 - includes sharing and explaining the visual purpose and other pertinent information to support clarity and group efficacy
- Example of an Opening
 - *Welcome.*
Thank you for coming. I am... and I'll be facilitating your meeting.
Today's purpose/task is to... (...determine, generate, explore, resolve, approve, identify, create, etc.).
My job is to support your thinking, help you stay on the agenda, and see that all voices are heard.
I will focus on the process but stay out of the content.
- How we will work together
 - Share attention signal, working agreements, etc.
 - If appropriate, negotiate the range of facilitation group would appreciate: tight-to-loose

Inclusion Activity

Share Visible Charted Outcomes

Share Visible Charted Public Agenda

Announce First Agenda Item

- Use What? Why?
- Use How? Strategies, Processes, and Structures
- Use How? Visually available if multiple-step directions
- Give an overview of lengthy or complex directions
- Use visual paragraph if appropriate

Repeat above for all agenda items

Throughout meeting attend to...

- Relationships, Group Dynamics, Engagement
- Focusing the Group's Attention
- Giving Clear Directions
- Information Generated
 - Invite group awareness—especially lift/chart information, data and learnings related/relevant to the outcomes
- Information to be displayed publically and in what form
- Energy of the Group
- Use of Norms of Collaboration
- Choosing Voice
- Asking Invitational questions
- Recovering if necessary

Closing the Meeting

- Reflecting and Processing
 - Products, Information, Processes, Group Working Agreements, Norms, etc.
 - If appropriate, support the group in Goal Setting
- Next Steps
 - Clarify who does what by when
 - Test commitments
 - Arrange for communications
 - Assess the meeting
 - Arrange for next meeting (date and facilitator)