

# Basic Facilitation



# **Facilitator Guide:**

## ***Basic Facilitation***



A Half-Day Workshop

Based on the book “High Impact Facilitation”  
by Terry R. Bacon, PhD

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## About This Guide

This guidebook is divided into timetable pages, instruction and content pages, and workbook excerpt pages. Instruction and content pages show relevant visual aids to display as you cover content. Look for the visual aid thumbnails as you read through the guide. Participant page excerpts look like the example below. Notice that the accurate page number is located on the example. As you cover the content in this course, refer participants to relevant workbook pages. Workbook page excerpts may divide instructions.

As you read our instructions, embellish the content with stories and examples from your experience. You are a valuable resource for participants. Although it is not necessary to rework the Basic Facilitation process, we hope you will enrich and personalize the content.

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Participant workbook examples have been correctly numbered to help you guide participants to appropriate pages.





# Workshop Design

## What Should My Background Include?

This course is designed for anyone who has facilitated events, meetings, groups, or teams. It is helpful if you have been trained in facilitation skills, but not necessary. We will provide relevant content for you every step of the way. You should brush up on interpersonal skills prior to the training if you do not facilitate on a regular basis. Certified trainers, managers, supervisors, team leaders, consultants, and group leaders are all good candidates to facilitate this workshop.

## How Large or Small Can the Class Be?

We recommend a class size of between five and fifteen. The role plays are designed for groups of five. If your class does not consist of multiples of five, you will need to tailor role plays slightly to stay on schedule. If you exceed ten participants, you will need more workbooks. Call 1-800-344-0451 to order more.

## Who Will Benefit From This Workshop?

Any person who facilitates meetings or events will benefit from this workshop. Research shows that most managers and team members spend 20 to 40 percent of their time in meetings and work-related group activities—salespeople, more than 40 percent. Professionals will benefit from improving the skills needed to conduct productive meetings and group interactions. Even seasoned professionals come away from this workshop with key learnings.

## What Training Techniques Will I Use?

- Ground rule setting
- Role plays
- Brainstorming
- Personal modeling
- Observation sheets
- Professional videotape that models behavior



## Materials and Logistics

### What Materials Will I Need?

- Facilitator guide
- One participant workbook per person (This packet contains ten workbooks. Call 1-800-344-0451 to order more)
- One set of overhead transparencies (Use the diskette supplied to print transparencies)
- Two sets of role cards (Copy more as needed, or call 1-800-344-0451 if you would like additional laminated role cards)
- One package of Post-it® Notes per participant

### What Equipment Do I Need?

- Two flipcharts
- Overhead projector
- Projection screen
- Television monitor and VCR (consider providing two if you have more than ten participants)
- Flipchart markers
- Box of sharpies (markers)
- Overhead nonpermanent markers
- Acetates to photocopy your overheads

### How Can I Prepare?

Before the workshop:

- Make sure you have enough materials for all the participants.
- Set up the room (or rooms if you have a break-out room).
- Check the equipment.
- Test your overheads.
- Read through the facilitator guide again.
- Familiarize yourself with any content you find difficult to cover.
- Review instructions for the exercises.
- Watch the *Basic Facilitation* video again. These are the behaviors that you will be modeling for the group.



## What Can I Do If the Group Deviates From Schedule?

- If the group is going too fast, are people disclosing too little about themselves? Are people nervous and, as a consequence, superficial? If this is the case, try to help stimulate conversation and draw reticent members out. For more information about drawing reticent members out, watch the *Basic Facilitation* video module called “Disruptive Behaviors: Withdrawing.”
- If the group is behind, are some members straying from the topic at hand? What can you do to encourage people to stay on track? Use the parking lot technique with members who stray often but have good insights. Create a flipchart that says “Parking Lot” at the top. Write relevant ideas on this page and cover them at a later time. For more information about the parking lot technique, see the “Running Meetings” module on the *Basic Facilitation* video.
- If the group is behind, are you doing enough to direct members and move the group from one topic to the next? Are you talking too much? Are you watching the clock and encouraging members to wrap up discussions?
- If you stray too much from the schedule, eliminate a round of practice from the role plays or cut an exercise or two. Consider shortening lunch. Ask the group members what they would like to do. Some participants may want to work late.

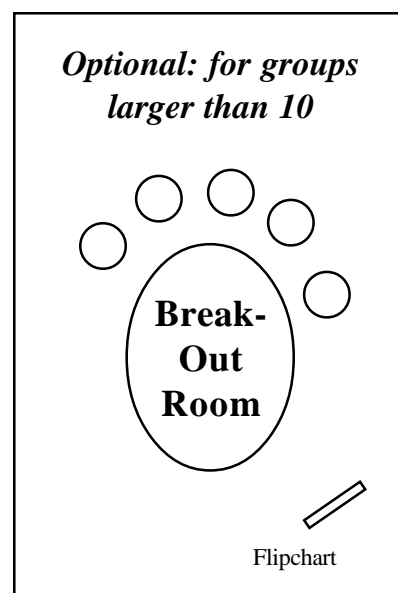
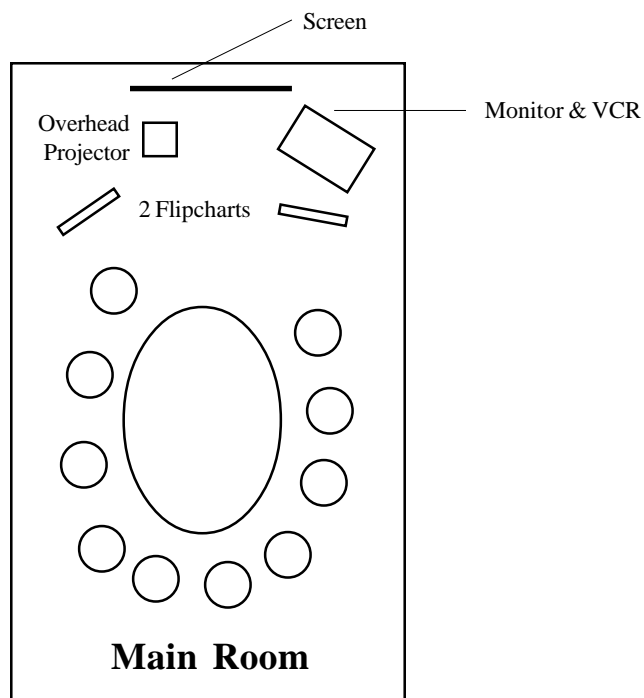




## Room Setup

Ensure that the following room arrangements are made:

1. You should only need one room for a group of ten. See main room sketch below.
2. If your group is large, we recommend that you reserve two rooms—one should be large enough for the configuration below (to the left) and another to accommodate 5-10 people (to the right). Also consider using a co-facilitator to coach the interaction in the break-out room.
3. A total of two flipcharts will be needed (three if you have a break-out room).
4. The instructor will need an overhead projector and screen in the main room.





## Participant Workbook Table of Contents

We know that scrambling to find a page number for a participant may be difficult as you are presenting. Each section of this guide contains key pages from the participant workbook with correct page numbers. However, in the event that a participant is curious about a particular topic, you can locate relevant pages using the table of contents below. You may also want to review this table of contents with participants as an overview to the training at the beginning of the day. Notice that note pages have also been included for participants. Participant workbook note pages have a copy of the appropriate visual aid and space for taking notes about that topic.

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## Introduction and Video

### Timetable

**8:00 – 8:05    Program Introduction**

**8:05 – 8:15    Program Overview**

**8:15 – 8:45    Video Viewing**

**8:45 – 8:55    Break**



## Program Overview (10 minutes)

- Ask participants to turn to page iv in their workbooks.
- Review the agenda with the participants.
- Say, “By the end of today, you will have developed skills for:
  - Opening a meeting
  - Running a meeting
  - Handling disruptive behaviors
  - Closing a meeting
  - Encouraging groups to be more interactive
  - Increasing group productivity in meetings.”
- This course focuses on the knowledge and skills necessary to lead effective group interactions. In addition to basic meeting management, this course explores how facilitators manage group dynamics.
- Throughout the course, participants will be working in small teams with other program participants. Everyone will have a chance to act as facilitator and meeting member. Both roles are important.
- Facilitation means to “Make Easy.” This course is designed to help teach people how to make it easy to have productive events and meetings.
- Facilitation is complicated because groups differ widely—from groups of strangers that will meet only once to teams who know each other well. Facilitator’s roles vary from pure facilitator (no content expertise) to coach or teacher (who tries to make group members self-sufficient) to facilitative leader (who must balance his or her content knowledge and process focus).
- Ask the group what kinds of meetings they lead. Are they responsible for content as well as for how smoothly the meeting flows? Tell the group that most people act as facilitative leaders, so their challenge will be to balance content and process issues, to lead the group without directing it, and to provide significant content where appropriate while encouraging participation and handling disruptive behaviors.
- This program is based on the assumption that the facilitator is a peer of the meeting participants. As such, he or she should have content knowledge comparable to that of the others in the group.
- Say, “We will now view the video. Each of the four video modules has notes pages in your workbook which include key learning points for your convenience. I suggest you take a moment now and mark pages 2, 7, 8, 18, 19, and 27 so you will find them easily as the video is running.” Insert and play the video.



# Agenda

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## Program Agenda

8:00 - 8:05	Program Introduction
8:05 - 8:15	Program Overview
8:15 - 8:45	Video Viewing
8:45 - 8:55	Break
8:55 - 9:05	Video Discussion
9:05 - 9:10	View Opening Module
9:10 - 9:30	Opening Meetings Exercise
9:30 - 9:40	View Running Module
9:40 - 10:30	Running a Meeting Role Play
10:30 - 10:40	Break
10:40 - 10:50	View Disruptive Behaviors Module
10:50 - 11:40	Disruptive Behaviors Role Play
11:40 - 11:45	View Closing Module
11:45 - 11:55	Closing Exercise





## Video Discussion

### Timetable

**8:55 – 9:05    Video Discussion**



## Video Discussion (10 minutes)

### Objectives:

- To make participants realize that many problems encountered during facilitation are common to all meetings.
- To foster an open and honest dialogue among group members.

### Instructions:

- Ask participants to turn to page vi.
- Say, “Now I will go around the room and ask each of you to relay a personal experience you’ve had as either a facilitator or meeting participant. I’d be particularly interested in any problematic moments or interactions that may have been alleviated using skills from the video.”
- Ask each group member for input.
- Write key comments and observations on the flipchart.



## Video Discussion



## Video Discussion

Your facilitator will now lead a discussion on the video. You will be asked to recount from your personal experience. Please be as open as possible so that other group members can learn from mistakes or problems you have experienced. The lines below are provided for notes on the discussion.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



## **Module—Opening a Meeting**

### **Timetable**

**9:05 – 9:10 View “Opening a Meeting”**

**9:10 – 9:30 Brainstorming Ground Rules Exercise**



## Brainstorming Ground Rules Exercise (20 minutes)

### Objective:

- To practice both brainstorming with Post-it® pads and setting ground rules.

### Procedure:

- Give each participant one 3"x5" Post-it® pads and dark marking pen. Supply masking tape to hang flipchart sheets on the wall.
- **Say:** "Ground rules are touched upon in the video. Now we're going to do an exercise in which we'll establish ground rules that are more tailored to your particular needs."
- Divide the group into subgroups of four to six. Ask each subgroup to go to a flipchart or wall space.
- **Say:** "Ground rules will be different from group to group and from meeting to meeting. The important thing is that they are **the group's** rules, not the facilitator's. In the video, the issues of punctuality and interruptions are mentioned. What other, more specific, ground rules can your group come up with."
- Ask people to brainstorm by writing their ideas onto a Post-it®—one idea per Post-it®. Tell them to avoid evaluating ideas as they go.
- When they finish writing an idea, they say it aloud and place the Post-it® on the wall or flipchart sheet.
- Allow five minutes for initial brainstorming. When brainstorming is done, ask each subgroup to identify the logical categories of the ideas posted and to rearrange the Post-its® on their wall or flipchart so they are organized by category.
- Ideas can be ranked under each category through discussion or voting. One useful voting method is the "10-4 method" in which each person votes on the most important or best ideas by distributing 10 points among 4 items and giving no idea more than 4 points. Counting the total points for each item gives a group ranking.
- Allow five minutes for groups to make their final ground rules.
- Ask each group to hang a final draft of ground rules at the front of the room. Discuss differences and similarities (five minutes).
- Display "Opening A Meeting" overhead during this exercise.

### ***Opening A Meeting***

- **Room setup**
- **Set enthusiastic tone**
- **Make introductions**
- **Ground rules**



# Brainstorming Ground Rules Exercise



## Brainstorming Ground Rules Exercise

### Objective:

- To practice both brainstorming with Post-it® pads and setting ground rules.

### Procedure:

- You should receive one 3"x5" Post-it® pad, a dark marking pen, and masking tape to hang flipchart sheets on the wall.
- You will be divided into groups of four to six. Each group should go to a flipchart or wall space.
- Brainstorm by writing your ideas onto a Post-it®—one idea per Post-it®. Avoid evaluating ideas as you go.
- When you finish writing an idea, say it aloud and place the Post-it® on the wall or flipchart sheet.
- Follow your facilitator's instructions for narrowing your list of ideas.

Record your group's final list of ground rules in the box on the next page.





## Brainstorming Ground Rules Notes



## Brainstorming Gound Rules Notes

[illegible][illegible]

## Your Team's Ground Rules

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_



## Module—Running a Meeting

### Timetable

**9:30 – 9:40    View “Running a Meeting”**

**9:40 – 10:30    Running a Meeting Role Play**

**10:30 – 10:40    Break**



## Running a Meeting Role Play (50 minutes)

### Objective:

- To reinforce the learning points from the video immediately so participants will remember them.

### Facilitator's note:

- We strongly suggest that you familiarize yourself with the role plays before conducting this exercise. It will be critical that you monitor the time in order that everybody gets a chance to practice facilitating. During this portion of the program, we recommend you use a stopwatch. Since some participants get very involved in role plays, you should tell them when to switch facilitators.
- This exercise is designed for groups of five. If you change the group size, you will also need to adjust times if everyone is to practice facilitating.

### Procedure:

- Spend three minutes breaking participants into groups of five. Ask everyone to turn to page 10 for a list of meeting topics. Each topic is designed to give the group both pros and cons on either side of an issue. Each participant will have a turn to facilitate. Ask the groups to choose a facilitator for the first round. The facilitator should select from the list of topics.
- After the facilitator has chosen a topic, he or she should spend three minutes away from the group reviewing the learning points from the Running a Meeting module.
- Say: "During this three-minute period, the groups should agree among themselves who will argue in favor and who will argue against the presented idea. It is acceptable, in fact preferable, if you add to the ideas already presented on either side of the issue. Use your imagination and personal experience to enrich the role play. Write notes so you'll remember your issues during the exercise."
- Say: "The purpose of this exercise is for the facilitator to practice the skills, not for participants to resolve the issue. Please don't exaggerate disruptive behaviors at this time. There will be a disruptive behaviors exercise to follow."
- Say: "During the role play, each group member should take notes on the facilitator's use of the skills. Turn to page 13 in your workbook for role play observation sheets."
- After three minutes, the facilitator returns to the group and the meeting begins. Allow the meeting to run five minutes.
- Repeat the exercise four more times. Everyone should have the opportunity to facilitate.
- Have each group member give his or her observation sheets to the respective facilitators.



- Bring the group back together. Spend the last five to seven minutes asking them for observations and comments on the exercise.
- Use a blank sheet on the flipchart to record the group's responses.
- Display these overheads in turn during the role play:

## ***Running A Meeting***

- **Manage the discussion**
  - Ask clarifying questions
  - Build group memory
  - Discourage group think
  - Parking lot
- **Balance participation**
  - Make eye contact
  - Round robin technique
  - Include everyone
  - Ask low participators for help

## ***Running A Meeting***

- **Manage transitions**
  - Summarize the topic
  - Use clear segues
  - Agenda as road map
- **Identify strategic moments**
  - Note moments of group agreements
  - Summarize key points
- **Use the group's resources**
  - Use open-ended questions
  - Tolerate silence
  - Mobilize group knowledge
  - Use their words



## Running a Meeting Role Play



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### Running a Meeting Role Play

**Objective:**

- To employ the learning points from the video immediately.

**Procedure:**

- On the following page, you'll find a list of meeting topics. Each topic is designed to give the group both pros and cons on either side of an issue. Each participant will have a turn to facilitate.
- Choose a facilitator for the first round. The facilitator should select from the list of topics on the next page.
- After the facilitator has chosen a topic, he or she should spend three minutes away from the group reviewing the learning points from the Running A Meeting module.
- The rest of the group should now agree among themselves who will argue in favor and who will argue against the presented idea.
- The exercise is to be repeated four more times. Everyone should have the opportunity to facilitate.



## Meeting Topics (Facilitator's Choice)

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### Meeting Topics (Facilitator's Choice)

#### Should the company move to an HMO from the preferred provider plan?

- HMO would allow the company to extend benefits to a greater number of employees.
- HMO would force people to seek care from specified physicians. Limits choice.
- Would it cover chiropractic, dental, vision?
- HMO co-pay is lower.

#### Should the company provide Internet access at every desk?

- Distraction: workers will waste time surfing.
- Will save time. Currently, employees must go to a special room for web-based research. Often, there is a wait to get on the Internet-ready computers.
- Expense.
- Expense of being behind the tech curve.

#### Where should we hold the company Christmas party?

- Martha's is too close. Everybody goes there already. It won't be special.
- Antler's lodge is 25 miles out of town.
- Last year, we had it out of town and fewer people showed because of the distance and weather.

#### Should we add the new muffler to our Lawn Trooper push mower?

- The Lawn Trooper is popular because of its compact size. The new muffler is larger, could impact sales negatively.
- The new muffler makes Lawn Trooper substantially quieter.
- Customer feedback tells us people are looking for something quieter.
- It's more expensive. Increased price may impact sales.
- Could we not get a quieter muffler that is no more expensive?

#### Should we dam the Salt Fork River in order to build a new power station and reservoir?

- Dam would displace roughly 300 families.
- The electricity generated would benefit over 5000 families in the form of lower electricity bills.
- Salt Fork Wilderness Area is currently a popular fishing destination.
- The new reservoir would provide even greater recreational opportunity.





## Meeting Topics (continued)



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### **Should we hang a plaque in the conference room recognizing Samantha Hilversam's achievements?**

- As designer of our SmartBooks software, she effectively launched this company.
- There were other people involved. Will they be slighted?
- Will all software developers expect a plaque or some other grandiose recognition simply for doing their jobs?

### **Should the company move to the new industrial park in the suburbs?**

- Our current location downtown has been a fixture in this city for 30 years.
- We've grown too big for this space. The new location would offer more office space for mid-level managers and others.
- Modern facility would be more comfortable and more well lit.
- The current facility has character. That character has become part of our image.

### **Should taxpayers pay for a new stadium?**

- What's wrong with the old stadium?
- Football makes enough money. Let the team or the league pay.
- New stadium would create jobs.
- Current stadium is regarded as dilapidated by both athletes and fans.

### **Should web-based companies be allowed to compile and sell lists on your buying preferences?**

- Invasion of privacy.
- Helps consumer save time.
- Results in still more, unwanted junk mail and junk e-mail.
- Mailing lists have been common practice for decades. Why should web-based companies and their lists be singled out?

### **What should the government do with the budget surplus?**

- Shore up Social Security and Medicaid.
- Sweeping tax cuts.
- Allot much-needed funds for education and environmental research.
- Increase military funding.



# Role Play Observation Sheet



## Role Play Observation Sheet

Facilitator's Name \_\_\_\_\_

1. What did the facilitator do that was effective? \_\_\_\_\_

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2. What did the facilitator do that was not so effective? \_\_\_\_\_

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3. Did the facilitator's body language suggest that she/he was comfortable in front of the group? Explain.

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4. Did the facilitator establish and maintain control of the discussion? \_\_\_\_\_

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5. How, specifically, could he or she have been more effective? \_\_\_\_\_

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6. General Comments \_\_\_\_\_

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## **Module—Disruptive Behaviors**

### **Timetable**

**10:40 – 10:50 View “Disruptive Behaviors”**

**10:50 – 11:40 Disruptive Behaviors Role Play**



## Disruptive Behaviors Role Play (50 minutes)

### Objective:

- To build upon the skills practiced in the earlier role play. To help your participants get accustomed to problematic situations while facilitating.

### Facilitator's note:

- This role play follows nearly the same procedure as the first. So again, it is imperative that you monitor the time.
- This exercise is designed for groups of five. If you change the group size, you will also need to adjust times if everyone is to practice facilitating.

### Procedure:

- Spend three minutes breaking participants into groups of five. See that the groups are different than those of the first role play exercise. Ask everyone to turn to page 10 for a list of meeting topics. Each topic is designed to give the group both pros and cons on either side of an issue. The chosen facilitator should select from the list of topics. Tell them they may choose a topic they've already played in the earlier exercise if they'd like the continuity, or they may pick a new one.
- After the facilitator has chosen a topic, he or she should spend three minutes away from the group reviewing the learning points from both the Running a Meeting module and the Disruptive Behaviors module.
- Distribute role cards to each group.
- Say: "As in the first role play, the groups should now agree among themselves who will argue in favor and who will argue against the presented idea."
- Say: "This time each group member will also choose one of the role cards." For the sake of balance, we recommend that two group members get the "Normal" role card.
- Say: "You should now spend the next three minutes preparing both to argue your side of the issue and exhibit the behavior on your role card. Use your imagination and experience to enrich the role play. Write notes so you'll remember your lines during the exercise."
- Say: "During the role play, each group member should take notes on the facilitator's use of the skills. Turn to page 22 in your workbook for role play observation sheets."
- After three minutes, the facilitator returns to the group and the meeting begins. Allow the meeting to run five minutes.
- Repeat the exercise four more times. Everyone should have the opportunity to facilitate. See that group members choose different role cards for each role play.
- Have each group member give his or her observation sheets to the respective facilitators.



- Bring the group back together. Spend the last five to seven minutes asking them for observations and comments on the exercise.
- Use a blank sheet on the flipchart to record the group's responses.
- During the role play, display these overheads:

## ***Disruptive Behaviors***

- **Talking on the side**
  - Eye contact
  - Stand behind disrupters
- **Sniping**
  - Acknowledge sniping
  - Confront sniping
- **Avoiding**
  - Inquire about reluctance

## ***Disruptive Behaviors***

- **Rushing**
  - Check pace with others
- **Overbearing**
  - Limit air time
  - Stand and move
  - Off-line appeal
  - On-line appeal



## Rushing

### During the meeting, you should be impatient:

- Have the attitude that everything is moving too slowly.
- Question whether the group has to address everything. (Aren't some things obvious? Can't you reach agreement on them without hours of endless debate?)
- Be impatient in your voice and gestures. Fidget. Drum your fingers on the table.
- Look at your watch often.

## Overbearing

### During the meeting, you should be overbearing:

- Adopt the attitude that you are **the** expert—you have all the answers.
- Criticize new ideas before people have a chance to explain them.
- Don't support anything you don't favor totally.
- If you can, intimidate people who don't agree with you. You know for certain they're wrong.

## Sniping

### During the meeting, you should be a sniper:

- Make degrading or negative comments about others.
- Turn to the person next to you and make jokes about whoever is speaking. Say things like:  
"As if he knew anything about it."  
"That's not what she said yesterday. What'll it be tomorrow?"  
"What I want to know is, what's in it for him?"
- Make your comments loud enough to be disruptive.

## Withdrawing

### During the meeting, you should be withdrawn and silent:

- Don't volunteer anything. Don't speak unless spoken to.
- Look bored. Stare away from the meeting periodically and daydream.
- Follow the discussion but don't get involved.
- Doodle. If you are ignored, take out a magazine or newspaper and start reading it.





## Normal

### During the meeting, you should be yourself:

- Participate in the discussion.
- Contribute appropriately.
- Listen reflectively to others and assert your own point of view.
- Be a team player and add value to the meeting.



# Disruptive Behaviors Role Play

Basic Facilitation



## Disruptive Behaviors Role Play

### Objective:

- To help you get accustomed to problematic situations while facilitating.

### Procedure:

- Turn to page 10 for the list of meeting topics. Each topic is designed to give the group both pros and cons on either side of an issue. Each participant will have a chance to facilitate.
- Choose a facilitator for the first round. The facilitator should choose from the list of topics.
- After the facilitator has chosen a topic, he or she should spend three minutes away from the group reviewing the learning points from both the Running a Meeting module and the Disruptive Behaviors module.
- The rest of the group should now agree among themselves who will argue in favor, and who will argue against the presented idea
- You will also choose one of the role cards presented to you by the facilitator. These will explain which disruptive behavior you should exhibit.
- Now spend the next three minutes preparing both to argue your side of the issue and exhibit the behavior on your role card.
- Repeat the exercise 4 more times. Everyone should have the opportunity to facilitate. Choose different role cards for each role play.



# Role Play Observation Sheet



Basic Facilitation

## Role Play Observation Sheet

Facilitator's Name \_\_\_\_\_

1. What did the facilitator do that was effective? \_\_\_\_\_

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2. What did the facilitator do that was not so effective? \_\_\_\_\_

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3. Did the facilitator's body language suggest that she/he was comfortable in front of the group? Explain.

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4. Did the facilitator establish and maintain control of the discussion? \_\_\_\_\_

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5. How, specifically, could he or she have been more effective? \_\_\_\_\_

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6. General Comments \_\_\_\_\_

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## Module—Closing a Meeting

### Timetable

<b>11:40 – 11:45</b>	<b>View “Closing a Meeting”</b>
<b>11:45 – 11:55</b>	<b>Discussion—Evaluating the Meeting</b>
<b>11:55 – 12:00</b>	<b>Key Take-Aways</b>



## Closing and Evaluation Discussion (15 Minutes)

### Objective:

- To bring closure to the workshop.

### Procedure:

- Ask participants to read pages 28 and 29 in the workbook.
- Ask: "Are there any additions you would make to either of these lists?"
- Write additions on the flipchart.
- Say: "I'd now like to get feedback from you. I'll ask each of you for at least one suggestion for how I might improve this workshop. Please take a moment to think of at least one suggestion."
- Write suggestions on the flipchart, thanking each participant for their input.
- Thank the group for their participation.
- Say: "Now I'd like you to spend the last five minutes completing the Key Take-Aways on page 30 of your workbook."
- Display this overhead:

### ***Closing A Meeting***

- **Review agenda**
- **Summarize decisions and recommendations**
- **Determine remaining issues**
- **Manage follow-up actions**
- **Evaluate meeting**



## Discussion—Evaluating the Meeting

Basic Facilitation



### Discussion—Evaluating the Meeting

Your facilitator will now lead a discussion on meeting closure and evaluation. Please review the following points on meeting evaluation and the closing checklist on the following page.

In many types of meetings, you should ask participants to evaluate the event. An evaluation:

- Reinforces the positive aspects of the experience for the participants.
- Helps you determine what worked and what didn't.
- Gives you specific ways to improve your facilitation of future events.
- Enables you and the group to set ground rules for improving subsequent meetings.

Here are the kinds of questions you might ask a group during the evaluation of the event:

- How did you feel about the meeting?
- How were the pace and tone of the meeting? Too slow? Too fast? Just right? Was the agenda all right? What could/should we have done differently?
- Did we stay on the subject? How can we avoid going off track?
- How effectively did we work together? How could we improve our interactions?
- Did you feel listened to? Were your contributions valued?
- How could we listen more effectively?
- How well did we respond to one another? Communicate? Resolve conflict? Reach consensus?
- Was this meeting worth your time?
- How effective was the facilitator? What could he or she do differently next time?
- Were the logistics all right? Did you have everything you needed to be effective? How were the facilities, breaks, meals, transportation, social events, etc.?



# Closing Checklist

*Basic Facilitation*

## Closing Checklist

- ☐ Debrief any processes that occurred before the closure of the meeting.
- ☐ Review the agenda; note what content the group covered and what the group accomplished.
- ☐ Summarize the conclusions, decisions, and recommendations the group has agreed to.
- ☐ Determine whether any issues remain; if so, decide how to address them. Write the decisions on a flipchart.
- ☐ Determine whether more data or analysis is needed and who will obtain them.
- ☐ If you used a recorder, ask if that person has any questions or needs clarification.
- ☐ Determine what information should be communicated to people outside the group and how to communicate it.
- ☐ Determine the next steps that should be taken and assign responsibilities and deadlines for these steps. Write them on a flipchart and obtain commitment from people.
- ☐ Identify agenda items for the next meeting and pre-work.

If appropriate:

- ☐ Review the ground rules and negotiate new ones.
- ☐ Leave time for people to say farewell to one another.
- ☐ Arrange for a closing ceremony that enables people to bring closure to their interactions.
- ☐ Evaluate the event.
- ☐ Do focused reflection on the event, either by yourself or with the group.



## Key Take-Aways



## Key Take-Aways

**Objective:** To provide closure to the program and investigate ways in which concepts presented in the **Basic Facilitation** program can be employed in the workplace.

What did you learn from this program? What key things did you learn about yourself and your facilitation style? What will you do differently in the future because of this program?

[illegible]





# Appendix A





## Note to the Facilitator

The models contained in this appendix are intended as an optional supplement to the program. In the event you have more than four hours and would like to elaborate on techniques for handling group interactions, you may find these models very useful. For more detailed information on these and other communication models, see the book ***Effective People Skills***, by Terry R. Bacon, PhD.



## ***Giving Feedback***

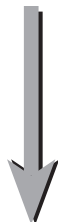
- **Observation**



- **Effect on me**  
(or perceived outcome)



- **Pause** (and listen)



- **Suggestion**



---

## ***Receiving Feedback***

- Be receptive to it
- Listen carefully
- Control your responses  
(Avoid arguing or defending)
- Probe for understanding
- Acknowledge the other  
person's point of view
- Thank him or her



---

# *Listening Skills*

## ***Releasing***

- Temporarily suspend your agenda
- Be open-minded; consider other views
- Don't interrupt; be patient

## ***Attending***

- Orient your body toward the other
- Maintain appropriate eye contact
- Be sensitive to incongruence in the speaker's verbals and nonverbals

## ***Amplifying***

- Encourage the other to continue
- Inquire—ask clarifying questions
- Build—add information or ideas that further the line of thought

## ***Reflecting***

- Summarize
- Paraphrase and link perspectives
- Contrast or differ constructively
- Note the speaker's feelings



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## ***Deflecting***

- **Remain centered**
- **Ignore personal attacks**
- **Reduce emotional content**
- **Discover commonalities**
- **Focus on the issues**



# ***Nine-Step Intervention Model***

- Eye contact
- Verbal redirect
- Gesture
- Limit air time
- Stand and move
- Stand with eye contact
- Off-line appeal
- On-line appeal
- Confront

***Low  
Level***



***High  
Level***