Mastering the Art of Facilitation

A Practical Guide















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Welcome!

Over the past thirty years I've had the pleasure and honor of facilitating hundreds of gatherings in which important conversations were had by groups small and large, comprised of individuals with diverse points of view. Many of these meetings involved National Park Service employees and volunteers, and other federal agencies, and I've also worked with a broad range of groups from civic organizations, municipalities, and non-profit boards, to NGO's in foreign countries, and even family groups grappling with every day life planning decisions.

I believe the skills of facilitation have an important role to play at all levels of organization in society. Not only can facilitated conversations lead to positive short-term outcomes, creating a culture of facilitation in our organizations can improve long-term efficiency, effectiveness and happiness. When everyone's ideas are heard, decisions benefit from an atmosphere of mutual respect. Facilitation can help cement new long-term partnerships, erase old boundaries, and strengthen interdepartmental understanding vital to building deep conversations and moving forward towards long-term goals. With an increasingly polarized society, flatter organizational models, the rise of networks, and the need to push decision-making down in organizations, facilitation is an increasingly important decision-making and communication skill set for all of us.

This guide is aimed at helping you grow your skills and confidence as a facilitator. Facilitators are made not born. Everyone can learn to be a better facilitator. At the start I cover basic definitions, the values and roles of the facilitator, checklists for preparing agendas, getting set for the meetings, and ensuring post meeting follow-through. Much of this guide is focused on tools in the facilitator's toolkit and approaches to dealing with challenges that may arise during facilitation engagements. I've included practice and exercises that can help you begin using facilitation techniques right away.

I hope this guide proves helpful. It is a work in progress and I would appreciate any feedback for improving and growing its usefulness. Contact me with suggestions at: Delia Clark, Confluence, PO Box 45, Taftsville, Vermont, 05073. Mobile phone: (802) 457-2075; Email: deliaclark8@gmail.com www.deliaclarkconfluence.com.

1 – The Art of Facilitation

"For the human species to evolve, the conversation must deepen." Margaret Mead

What is Facilitation?

Have you ever been part of a meeting in which, thanks to a skilled facilitator, you went away feeling energized – feeling that you were part of a team that was making real progress?

The word facilitation includes the Latin root of the verb meaning "to ease." Skilled facilitation can help daunting conversations or difficult group work feel effortless. It can help move complex group decision-making processes from conflict to collaboration and eventually resolution, increasing both the efficiency and effectiveness of the work of a community. A skillful facilitator can help change the energy in the room. In the context of skilled facilitation all voices feel heard.

The aim of facilitation is to increase the effectiveness and efficiency of any community – large or small – that has a shared purpose and shared work responsibility. Facilitation's toolkit and practices are designed to help groups of people get to where they want to go. Skilled facilitation increases individual contributions to group work and a sense of ownership of meeting outcomes.

The Core Values of Facilitation

Facilitation is always directed towards advancing the group's agenda, but not at the expense of a set of core process values. Facilitators model these values to the groups they serve.

Trust: a key ingredient to successful group work. Facilitation aims to grow trust between participants and trust in the meeting process itself. Successful meeting outcomes also serve to increase a group's trust capital. Success breeds success.

Respect: facilitation processes respect differing points of view, differences in individual personalities, communication styles, and diverse cultural perspectives.

Group Intent: facilitation is a container for the group agenda: stated purpose, goals and objectives. Facilitation helps a group stay focused on these.

Communication: facilitation's goal is to make communication clear, concise and respectful.

Transparency: there are no smoke-filled backroom deals in skilled facilitation. Facilitation aims to make meeting processes and decision-making agreements transparent to all.

Flexibility: facilitation is adaptive to the qualities and characteristics of the group. While there are common standards and tools, there is no one set right way to run a facilitated meeting.

Participation: facilitation aims to increase stakeholder and individual contributions to problem solving.

Humility: good facilitation is not the same as leadership, but like good leadership it provides a safe meeting context so that participants can lead.

Humor: the ability of a group to laugh at itself is golden-- sometimes the best way forward is a detour. Facilitators become skilled at reading the group, knowing what it needs – whether its brownies or levity to keep progressing.



Values that have emerged in my conversations with other facilitators

The Roles of the Facilitator

Facilitator roles vary depending on the needs of the group. The facilitator may take on some of the traditional roles of the chair (running the agenda) or secretary (note taking, etc.). In general though, the facilitator's role is to work attentively and creatively to guide the group toward its intended outcomes.

Agenda Setting and Pre-Meeting Tasks

Facilitators work with groups prior to meetings to help clarify goals and hoped-for outcomes, set agendas, design processes for each area of the agenda, and review the invitation for stakeholders. Pre-meeting work may also include helping a group assess its meeting technology needs, room set up, record-keeping plans, etc.

Meeting Management

During meetings facilitators typically monitor the agenda and ensure that the discussions stay focused on goals and outcomes, or that the group agrees to shift their process to accommodate emerging ideas. The facilitator, as chief listener, encourages participation but also ensures that no one voice dominates the conversation. During meetings facilitators keep track of agreements and group decisions. They also note areas of disagreement and unresolved issues for future work.

Follow-Through and Meeting Assessment

Post meeting, facilitators often work with members to assess meeting results and adjust future meeting agendas and processes. They may or may not have a role in writing up meeting notes and ensuring that all meeting participants receive appropriate follow-up information.

Uses of Facilitation

Facilitation skills, in that that they are primarily listening and communication skills, are useful everywhere. As a rule though, the need for skilled facilitation increases as the size and/or complexity of the meeting increases. Use your capacities as a facilitator in everything from regular staff meetings to large one-time community gatherings, planning sessions with partnering agencies or organizations, and one-one meetings with a team member.

A sample list to get you thinking includes:

Morning Briefings	End of Season feedback and
Staff meetings/weekly, monthly,	evaluation
annual	Budget/organizational meetings
Partners meetings	Informal meetings: carpool to water
Board meetings	fountain
Virtual meetings	Decision-making

Planning meetings Performance reviews Division meetings Interviews and recruitment

meetings

Conference calls and webinars One-on-one calls

City Hall and town official meetings

After action reviews/ debriefs

Public information and input

Informal meetings

Governmental meetings

Parent meetings

Teacher meetings

Intern meetings

Personal, family, budget, travel, etc.

Church meetings

Retreats

Teacher workshops

Conferences

Briefings and updates

Visioning and planning

Budgeting

Evaluation and after action reviews

Policy compliance

Planning

Community input and feedback

Long Term Groups such as:

Strategic Long Range Planning

Facilitation

Communities of Practice, CLIPS

LRIPs (Long Range Interpretive

Plans)

Regular Staff and Department

Meetings

2 - Facilitation Skills

In a Nutshell: Ten Keys to Successful Facilitation

Here is the essence of the approach I bring to every facilitation engagement:

Clarify Goals

Start by talking with meeting organizers to clarify the big picture goals, then keep checking in with goals throughout the meeting. It may be a great process and everyone may be having a great time, but if it's not moving toward the desired goals, it's not working. As Yogi Berra supposedly said "We don't know where we're going – but we're making great time!"

Claim Your Space

From the first conversation on, be clear that everyone understands the potential of your role and supports you in it. You are there to help the group achieve their goals, but you need their trust to accomplish this. The only power you have is the power the group gives you. From taking a strategic place in the room to monitoring your posture, exude your energy as a force for positivity.

Go Personal

Continually create opportunities for personal connections and the building of relationships among participants. Intentionally mix up seating and break-out groups so that participants get to know one another. Share personal anecdotes to illustrate your points and encourage others to do the same. Don't shy away from emotion and heartfelt connection – these are a source of fuel for your work.

Mind Your Language

Language matters and helps listeners hear your true intent. "Yes, and..." conveys acceptance and collaborative building, while "No, but..." conveys disagreement and opposition. "What questions do you have?" conveys an open invitation, while "Do you have any questions?" conveys a closing down. "Let me see if I'm hearing you

correctly. Are you saying...?" conveys genuine interest. Test your language in everyday life and notice reactions.

Design for Emergence

Always take the time to think though how you will approach supporting a group in meeting their goals, the sequence of various questions, exercises and discussions. And, at the same time, know that "no agenda survives contact with the group", ie: as you get to know the people and questions involved, a different path forward will likely emerge. A skilled facilitator will see when to pivot and do it gracefully.

Ask, Don't Tell

Good questions are the fodder of good facilitation. The art of asking good questions reveals itself in an opening to further exploration and learning, delving through layers to underlying truths. When in doubt, "Why?" is always a good question, if asked in an open and non-judgmental way.

Find the Fun

Humor is your friend. When you are able to evoke a good-hearted laugh from the group, it shifts the energy in the room and raises morale for the task at hand. Strategically chosen games, surprising graphics or tools, a "walk 'n talk exercise", or even the repetition of what has emerged as an inclusive in-joke all work wonders to advance the work of the group.

Scribe with Intention

Anybody can cover a flip chart with words – the trick is to harvest the RIGHT words – those that advance the conversation by honoring the speaker and capturing the essence of what's been said in a way that builds common understanding and moves the conversation to the next level. Practice listening for the speaker's intent, capturing some of their own language, and doing it rapidly so your scribing doesn't slow the conversation.

Stay at 30,000 Feet

Your job is to see the forest instead of the individual trees. While meeting participants dig deeply into the details of the issue at hand, listen for trends, congruence, direction, emergence of consensus around key issues and mirror what you see to the group to test for accuracy. When the group bogs down, remind them of the arc of the process, where they are, and reassure them about their progress.

Vary the Texture

Continually monitor the energy of the group and build in variety to keep participants fresh. Utilize exercises that get everyone standing up and moving around the room, or outside. Plan in silent writing and reflection time, one-on-one conversations, small groups, and plenary dialogue. I like to imagine the group as an accordion, going in and out. Alternate longer breaks with short stretch breaks.

Setting the Meeting Tone

As facilitator, you are responsible for the overall tone during the meeting. Creativity and group involvement often hinge on a safe, secure, non-judgmental environment where every voice is heard and respected. It is the facilitator's role to create this environment throughout and model a respectful participant. A skillful facilitator brings their best self to the meeting.

Your Presence as a Facilitator

- Act warm, positive and enthusiastic
- Remember that your facial expressions and body posture tell a story; keep an open, positive expression and poise.
- Make eye contact with participants
- Be relaxed. Wear clothes your feel comfortable in and comfortable shoes
- Bring enthusiasm with you: prepare for facilitating by doing activities that energize you beforehand for example, before facilitating a meeting, take your dog for a walk, sing alone with your favorite song, exercise, enjoy a cup of coffee whatever makes you feel positive and energetic

Modeling Respect for Others

- Listen actively and well with genuine interest and openness: show interest in everyone's statements and opinions
- Help participants feel comfortable, welcomed and included
- Involve everyone balance the groups participation welcome diverse opinions
- Try not to single anyone out or embarrass anyone
- Recognize the validity of all points of view (this is especially difficult, but vital when you privately disagree with someone's views)
- Treat group members' ideas without bias (positive or negative). Do not criticize or praise any particular idea
- Thank people for their contributions
- Use people's names
- Enable to sharing of ideas among group members
- Relax and enjoy the people and the process

Managing the Meeting Process

Your job as a facilitator actually begins with the first exploratory phone call or email. By the time of the meeting you have planned together, possibly weeks in advance, you are well aware of meeting goals and hoped for outcomes. You know or have learned much about the individuals you will be working with so that you can skillfully managing the meeting process and participants achieve their desired outcomes.

Since meetings are such an organic and essentially unpredictable event, you will need to be constantly "on", aware of the mood of the group, side conversations and flow, watching and listening for nuance and trouble-shooting as necessary. In addition, you are responsible for facilitating multiple tone-setting and transitional moments during the meeting.

Getting Started

- Start the meeting being sure that everyone knows who else is present and is clear about what the task is you're setting out as a group to do and about the process you will use so that they may work with you and not against you.
- Provide the group with meeting ground rules and make sure people understand and agree with them. If necessary, gently remind people to abide by them.

Working the Agenda

- Clearly understand the agenda and the expectation of each small-group process, so those expectations will be met.
- Know the agenda and keep the group on topic and on schedule. Keep control of the group in a subtle way let conversations flow, but within the boundaries, so you can stay on topic.
- Focus and re-focus the conversation to tasks at hand: gently but continually work to keep the participants on the subject and headed toward their desired outcomes.
- Ensure high priority tasks are met.
- Use "emergent design" to continually assess progress and adapt agenda and tools to emerging needs of group
- Be flexible and willing to pivot when it becomes clear that the agenda needs modifying, or that more time needs to be given to a specific topic
- Maintain a productive and safe environment that respects and benefits from diverse viewpoints
- Choose tools and strategies that effectively guide a group through conflict
- Choose appropriate tools to fit different stages of group process:
 - o Idea generation
 - o Idea evaluation
 - Decision making
 - o Planning to Action
 - Evaluation

Encouraging Involvement

- To foster full and appropriate participation, alternate structured and nonstructured conversations as needed to engage the diversity of participation styles of group members
- Welcome variety, diversity and disagreement: some of the best ideas come when two seemingly opposite concepts come together into a new idea.
- Draw all peoples' thoughts out.

- Try to get agreement on the factual stuff as early as possible so that you can focus on underlying shared values.
- Depersonalize the issues: avoid referring to concepts as belonging to the person who suggested them.
- Once the ideas are on the flip chart they belong to everyone and everyone should feel free to add to them.
- Keep the focus on the exchange of ideas and not on the people.
- Encourage all participants to start from what they personally know, then to radiate outward to family, community, big picture, rather than starting big. This helps them work from what makes their views and experience unique to ideas the entire group shares.

Listening and Observing

You are the eyes and ears of the meeting. Listening and sensing well and hearing what's actually being said are primary skill areas of the facilitator.

- During the discussion portions of the event, help the group to come to agreement when possible, and have all conclusions truly reflect the consensus of the group, and not simply the majority opinion
- Pay attention to the energy level of the group. Watch for such non-verbal clues as facial expressions, posture, involvement, tone of voice and respond to these clues appropriately
- Let ideas grow. As the group tests their ideas, bounding them off each other, they will refine and develop their ideas. An idea that started out as plain and simple can become vibrant and creative with discussion and input from the diversity of the full group.

Mirroring

You are the primary mirror for the group. In your speaking and writing you are truthfully and accurately reflecting back to the entire group what you have heard. You may choose to work as a pair, with one person with their eyes on the group facilitating, and one scribing.

Scribing

- Legible and rapid handwriting matters: as a facilitator you are often in the dual position of chief listener and chief scribe. While this can take practice, clear notes go a long way in helping people remember what was said.
- If you are the scribe of the meeting, ensure that you record people's thoughts as you heard them, skillfully capturing the detail of each person's comments and their meaning. If in doubt, check with the speaker to see if you have captured the key points of each person's contribution. This reinforces their

- sense of being heard and valued and increases the chances that their ideas will be understood and incorporated by others.
- Work as a team with your scribe(s), if you have one or several, and support each other's efforts.
- Flip charts are primarily a facilitation tool. If a detailed meeting record is desired, ensure that someone has been assigned to capture detailed notes on a laptop as the meeting progresses. These can also be made available to any participants joining virtually.

Speaking

- Listen carefully from the 50,000 foot perspective. Synthesize thoughts and mirror back to the group what you hear. If you hear an emerging consensus, test it with the group to enable them to leap forward.
- When you hear agreements being expressed summarize them for the group, testing whether you have heard correctly, and seeking agreement to use them as a basis for moving on.
- Only speak as much as is absolutely necessary. A facilitator is a servant to the group. Ideally, you are "invisible," just guiding the process, so that the focus will be on the content of the discussion, not on you.
- Never be an advocate for a project or a point of view
- If you need to contribute to the content of the discussion, feel free, but articulate that you are stepping out of your facilitator role for a minute to do it (One good way to do this is to assign an empty chair in the circle for you to sit in when you want to step out of your facilitator role and participate)
- Don't play the expert: let the group know that your job as facilitator is to moderate and guide the discussion, not to lead them to any pre-established conclusion. You have no more "correct" answers than they do, in fact, fewer.

Encouraging Involvement

Bring enthusiasm with you

Prepare for facilitating by doing activities that energize you beforehand--for example, before facilitating a meeting, take your dog for a walk, sing along with your favorite song, exercise, enjoy a cup of coffee--whatever makes you feel positive and energetic.

Make sure you are involved

If you are enthusiastic and involved in the process, it is more likely that participants will be too.

Remain Neutral about the Material, but Positive about the Process

Although you must remain neutral about the material – the facilitator should never be an advocate for a project or point of view unless they first formally step out of the facilitator role for a moment – you should exude confidence about the process. Assure people that their hard work will pay off.

De-Personalize the Issues

Avoid referring to concepts as belonging to the person who suggested them. Once they are on the flip chart, they belong to the full group, and everyone should feel free to add to them (eg: rather than saying "Mike's idea" say "the playground idea"). Keep the focus on the exchange of ideas and not on the people.

Welcome Variety, Diversity, Disagreement

Some of the best ideas come when two seemingly opposite concepts come together into a new idea. Create a safe and innovative space for that to happen.

Let Ideas Grow

As a facilitator, your role is to assist the sharing/growing process. As the group tests their ideas, bouncing them off each other, they will refine and develop their ideas. An idea that started out plain and simple can become vibrant and creative with discussion and input from the full group.

Be Positive, Appreciative, and Accepting

Thank people for sharing their thoughts or feelings with the group. More than anything else, this encourages involvement.

Recognizing and Respecting Cultural Differences

Diversity makes a group stronger. Consider yourself fortunate to have diverse genders, racial and cultural perspectives, ages, abilities, and beliefs in the room. The job of the facilitator is to build relationships among all present. To the extent that facilitated meetings represent more broadly communities beyond the room, the facilitator's job is to create broad social agreements, and social change built on consensus. To do their job facilitators need to develop habits that are inclusive of and welcoming of difference.

- If you can know your audience before getting into a room with them then you are in a better position to understand both the social, cultural divides and connections in the room. Ask the organizers ahead of time during the meeting planning process.
- Social/cultural perspectives, affinities, shared histories emerge during the meeting as you get to know people and they get to know each other. Be open to emergent design. Let diversity shape and mold the processes you've designed to get accomplish the meeting goals
- Set group agreements/ground rules that include "respecting the diversity of all people." If there is time or a long-term facilitation process is just beginning then help the group develop its own set of meeting norms.

- Be mindful of creating space for the minority voice in the room. Notice and provide support for voices or approaches that are different.
- Use appropriate language and gestures that are open and respectful. Provide opportunities for non-verbal sharing. Obtain cultural competency skills in general and become cognizant of different cultural body language.
- Break people into both affinity groups and mixed groups at different stages of the gathering.
- Have a variety of different foods and consider a themed potluck.
- Acknowledge and address moments when the group is culturally insensitive, and welcome cultural "corrections" as valuable learning.

Dealing with Hierarchy

Hearing and respecting all the voices in the room and valuing each voice equally are tenants of good facilitation. Building trust and providing a safe environment for open and candid conversations from all levels of work is essential to getting to outcomes and agreements that have real staying power. While conversations can be complicated when varied levels of staff are mixed together, this blending of diverse views and experiences provides rich fodder and a depth of understanding of issues that would be otherwise inaccessible. Tips to avoid obvious pitfalls of hierarchy in a facilitated meeting setting include:

- Set ground rules that include open-mindedness and respect.
- If it seems appropriate, acknowledge the various hierarchical levels in the room and call out the reasons this is of benefit to all. Identify and post shared values and common ground.
- Make it clear that ideas are welcomed from all levels.
- Clearly identify decision-making processes and roles early on in the process to avoid any sense of disenfranchisement later.
- Invite content presentations from field-level employees rather than solely supervisory level.
- Encourage participants to avoid speaking the phrase "above my pay grade."
- Use anonymous idea generation techniques such as sticky notes.
- Pro-actively design for success, for example encourage leaders not to sit at the head of the table or to speak first.
- In small groups mix it up, pair leadership with field level, but consider carefully before pairing staff members with direct supervisors.
- Have a pre-meeting with leadership so that efforts to break down hierarchy are transparent and have their support.

- Consider pre-meeting interviews with staff to understand their perspectives and take on the issues, and share these perspectives amalgamated and unattributed.
- Depending on the context of the meeting, consider having sessions without leadership.
- Have a facilitator from outside the organization/institution.
- Create and promote understanding that experience of an organization is likely significantly different in some respects at different levels. Name the differences while seeking the common ground.

Asking Good Questions

A critical skill in facilitation is asking good questions. At every step of the way good questions are the guideposts to getting the group to the outcomes it seeks. Good questions probe, deepen the conversation, invite inquiry and open vistas. They can't be answered with a yes or a no or a brief declarative sentence. Good questions invite conversations that lead to new questions; that move the group together toward the goal. They are generative. Keep in mind:

- Ask clear and concise questions
- Ask challenging questions that stimulate thought
- Ask reasonable questions based on what people know
- Ask honest and relevant questions

A good facilitator's rule of thumb is, "Never make a statement when you can ask a question instead." Once you ask a question, remember that a group response to questions requires time for the members to think. After you pose a question, pause for a full five seconds (which may seem like an eternity) and wait for someone to respond. To help yourself, count silently to ten before asking a second or follow-up question. Stand confidently and hold a space for the answers to emerge into.

Kinds of Questions

Informational Questions seek objective facts, data, circumstances that describe current conditions, the situation and environment. These questions help provide the context or framework for the work the group is doing. Examples include: What did you see? What has been written about this? How many people were involved?

Reflective Questions ask how the information we have makes us feel. They help participants relate, possibly in new ways, to their circumstances and to each other. Examples include: What were your emotions when you learned this? What about it did you find encouraging? Challenging? Odd? What have you learned from this?

Probing Questions follow up broader questions by digging into specifics and implications. Examples include What else do you know about this? Why is this important for us?

Interpretive Questions analyze information and feelings, bring forth meaning, and help participants understand. They allow participants to voice insights and articulate what the group has learned so far. Examples of interpretive questions include: What patterns do you see? What issues underlie current circumstances? What have we learned so far?

Clarifying Questions seek clarification for the benefit of the group and the process. Examples include: Could you tell me more about that, please? Could you help by giving an example? What are the pros and cons of this situation?

Decisional Questions are decisional and action-oriented. Examples include: What do we need to stop, start, or continue doing? And what steps should we take now? What needs to happen first, second, third?

Note: When Participants Respond to Your Questions When handling answers to questions, reinforce all answers positively. Be careful when praising ideas: don't compromise your neutrality by over-praising. Acknowledge the contributions of all respondents regardless of the answer given, to encourage engagement.

Questions that Can Help Advance the Conversation

- Can you tell me more about that?
- Can you suggest an alternative?
- Who else should be a part of this conversation?
- Why do you feel (or what makes you feel) that way?
- If you could wave a magic wand, what...? (for brainstorming).
- If resources were unlimited...?
- What are we missing? Are all the bases covered?
- Can anyone think of an example?
- How might we ...?
- Can anyone articulate the common ground?
- How can we rephrase the question?
- What's the next step?
- Do you an experience from a previous job or experience that relates?
- What's holding us back? (barriers)
- What are our vulnerabilities (in this plan or project)?
- What can each of you do in your position to advance this project/plan?

Questions to Get Unstuck By

More examples of questions that help keep the conversation moving:

There is a disagreement, or what you think is an incorrect or outrageous statement has been made:

- "So, in your mind, one of the significant aspects is X. How do others see it?"
- "Will you tell us, Sarah, in light of your experience, what your thought is?"

Someone says something that is unclear or could be misinterpreted:

- "Could you say something more about that, Zenobia?"
- "You mentioned that our most serious concern was (X). Let me ask you to say a little more about that."
- "Valeria, will you explain the reasons why you feel that idea is important?"
- "Bill, will you show us how this might work by giving an example"

The group is straying off the subject:

- "I'm getting the sense that we're getting off the topic right now. The question we're discussing is (X)."
- "It seems that we have strayed off track. I suggest that we re-focus."
- "How about if we pick up the pace a bit. Let's go around the circle and hear from each of you with just a brief idea on (X).
- "Why don't we stand up for a moment and stretch."
- "Jan, will you help us to review the points we've covered so far?"
- "Would you help us classify these points, Chen? What are some names of categories we can put our thoughts into so far? It will help us to organize our thinking."

Someone has been silent throughout the process:

- "Mary, which of these do you think is the most serious concern?"
- "Juan has indicated that his most serious concern is (X). Caroline, given your experience, what do you think?"

You are unclear about what has been said or what the point is:

- "Tony, I think I understand your point. You are saying (X). Is that correct?"
- "Mollie, can you tell us your point again? I want to be sure we record it correctly."

Someone makes the same point repeatedly, or won't stop talking about their idea:

• "You feel strongly about this point, and I want to be sure we have captured it. Is this (point to flip chart where the person's idea is written down) accurate wording for what you want to say?"

Tips for Avoiding Meeting Problems

Time

Give people time to collect their thoughts individually before asking them to speak in public, especially at the beginning of the meeting.

Motivation

Help people to find the "shelf" that they'll put things on by asking people to find where their energy for a topic is, ex: Why do you serve on this board? Why are we creating this long-range plan?

Process vs. Content

Help people to differentiate between content (the what) and process (the how). Sometimes people disagree about content just because they don't trust the process. If you get buy-in at the beginning it can help you with dicey content later.

Clarity

Clarify desired products and processes ahead of the meeting and get buy in from meeting organizers and from the group.

Agenda

Evaluate the reality of the agenda and revise if necessary – don't be overly ambitious or you will not have time for adequate process.

Techniques for Facilitating Troublesome Situations

When people are holding side conversations instead of focusing on the main discussion:

You can continue your job as facilitator, but do so while moving closer to the people who are chatting. Since most people will be paying attention to you, the people having the side conversation will soon realize that people are looking at them, too. This may quiet them down without your actually having to embarrass them publicly.

When two people are talking at once:

The facilitator may need to act as a "traffic police," and use the same gestures as one, but subtly. You may need to smile, put your hand up to stop one speaker, and point to the other speaker, saying "Okay, Mary, why don't you go first, and then George, let's hear from you next."

If people have complaints about the process:

Sometimes people are afraid that the process outlined will not get the group where it wants to go. Usually, people have enough faith to keep going, and discover that the process works. If people's complaints are actually interfering with the success of your discussion, however, you may want to take a break to discuss process. You may say, "Okay, let's stop for a moment. My sense is that this process isn't working for

everyone. I would like to ask you, as facilitator, if you are willing to go on with this process for ten more minutes. Then we can stop and evaluate whether we've made progress." Alternately, you can ask, "What do we need to do to be sure that you feel comfortable with this process?"

If someone is being disrespectful to others or to you:

Gently remind people about the "ground rules" that they have agreed to abide by in the discussion sessions. Say that you know that these are important discussions and tempers may flare, but that the process will succeed more quickly if we can put personal differences aside and focus on the ideas we share in common.

When someone insists on talking about something that is off the topic: First, make sure you understand the point that the person is making. Then, if necessary, you can make a special page of flip-chart paper called "Other Issues." Here, you can record ideas that may not belong under the categories you are now working with. You can tell the speaker, "We don't want this idea to get lost. However, since it doesn't specifically address the question we are working on now, we will record it on this other page, and make sure that it is included it in the final record of the meeting." Then, move the group back to the question at hand.

If someone is talking too much and dominating the discussion:

Walk up close to the speaker and, as they pause for breath, say, "Could I stop you for a moment and summarize what you have said? I want to be sure it is recorded, and tie it into the rest of the discussion." (You have to have been listening carefully for this to work!)

Or "I feel that you've said a lot, and I just want to be sure to incorporate it all into our discussion. Can I ask you to stop for a moment and summarize your point in one sentence?"

Once the idea has been recorded, you can use the flip chart to remind the speaker, "Yes, I believe that you made that point, and it is recorded right here."

When one person seems to want to sabotage the process with bad ideas: If someone has bothered to participate in the event, you should assume that they are there to contribute. If you treat them respectfully, they are likely to participate more rationally. You might use words like, "Fred, you seem to have a different perspective from the rest of the group on this question. Maybe you can articulate your top priorities, and then we can look for the places where we all have commonalities, and we can go on from there."

Remember:

No matter what happens, make an effort to remain positive, and try not to be defensive. Always assume that a participant's comments are based on positive intentions. Everyone is here because they are interested and want to make a

contribution. Meetings can be exciting processes and can be interesting to facilitate. So, relax and enjoy yourself!

When people go off on tangents

Place their comments on the "bike rack" sheet. Be sure to come back to them at the end of the meeting.

Veiled Comments

If a participant insists on making veiled comments under their breath instead of getting to the point in an open, reasoned and sharing manner, there can be a sense that the meeting is being undermined or not taken seriously by this particular member and this can infect other participants who get distracted by the behavior. This muttering behavior can spoil meetings and cause ripples of tension when side (or even snide) comments are overheard by everyone but few dare to react to the comments and put a stop to them. Here are some suggestions for dealing with someone like this.

- Talk to the participant who is muttering after the meeting in a quiet place
 rather than making them feel exposed. It is best to ride out the meeting in
 which the muttering is taking place rather than exposing this person because
 they will probably react defensively and either storm out or start an
 argument that creates bad relations within the meeting and fouls up the
 proceedings. Let them know that it gives the impression of undermining the
 meeting and colleagues
- Emphasize the word "respect" when dealing with this person. Nobody likes to feel that they are earning disrespect for their actions and if you can make this clear, it will help deter the participant from future unhelpful comments.
- If the muttering and snide commentary is really disruptive during the meeting, it may be necessary to deal with the mutterer in the course of the meeting itself. Wait for a natural pause (round-up time of a particular topic is good) and very nicely but firmly inform the muttering participant that you have noticed their wish to provide input to the meeting but that you didn't quite catch what it was they said. Ask this person to kindly repeat it the comments more loudly so that you can clarify their contribution. This is a direct and confrontational method for the person who is muttering you will need to judge the person and the context to see if this is a good and fair approach.

Care and Feeding of the Master Facilitator

Article by Steve Davis, Founder of Facilitator U.com: From graphic facilitation. blogs.com/pages

Facilitation is a demanding role that can take its toll on you if you are not prepared at all levels. A master facilitator must have fine-tuned awareness and intuition to sense and act on the nuances of group process. They must stand tall in the face of conflict, willing to walk participants through to its resolution if required.

They sometimes endure standing in a room for long hours, staying attuned to everything going on. They can't afford to space out and miss something important to the process. It may even be true that the facilitator, acting as a coach and role model, will challenge participants only to the level of her internal fortitude. This week's article *Care and Feeding of the Master Facilitator* describes habits and practices we can employ that will help to fortify us for the awesome and challenging task we call facilitation.

So how can we fortify ourselves for this awesome and challenging task we call facilitation? Will Spinach on Special K for breakfast do the trick? Or is there more? Though there are some things that you can do for yourself shortly before each event, there are also "habits" that take time to develop and cultivate over time, just as the Olympic athlete cultivates and prepares to maintain herself in peak condition to meet the demands of competition. We'll review some examples of these habits and practices below. Whatever nurturing habits you decide to cultivate, just be assured that if they help you to nurture the high energy, awareness, and perseverance of a facilitative leader, you'll be a model for others and a master of your fate no matter what role you play.

Application

There are many self-care actions we can take that will have immediate impact on our ability to be present and attuned to our work as facilitators. Here are a few examples in each of four major dimensions.

Physical

Eat light and healthy, especially prior to a facilitation session. Heavy food, sodas, coffee, or junk food will not support you. It will impact your ability to pay attention and reduce your endurance. Gift yourself with massages, hot baths, spa visits, etc. to help you relax and to affirm your self-worth. These actions affirm to yourself that you are as important as are those with whom you work. Breathe! Pay attention to your breathing while facilitating. This is particularly important during moments of stress when we tend to shallow breath. Steady, deep, and slow breathing will help keep you present, and provide your brain cells with optimal levels of oxygen for acute mental clarity.

Mental

Check the messages you're sending to yourself prior to your facilitated events. If you hear negative, self-defeating, or judgmental thoughts, stop and replace them with thoughts about how you'd ideally like things to turn out. Most successful people talk about visualizing their success prior to it happening. Yet most of us are drawn to visualizing failure. Our thoughts about what might happen are only fantasy anyway, so doesn't it make sense to win in your own fantasy?

Emotional

Attend to any nagging feelings you might have about anything prior to your event. If something is bothering you that can be handled with a quick conversation or action on your part, get it handled so it's not sapping energy from you while you're facilitating. If you have heavy feelings about something that can't be handled right away, give yourself permission to have the feelings. Express what you can through journaling, conversation with a friend, or private reflection prior to the event and make an appointment with yourself at a time when you can deal with this issue further.

Spiritual

Grounding, centering, or connecting with the source are very important to effective facilitation. People use such practices as meditation, prayer, Tai Chi, marshal arts, etc., to enhance their connection with something greater than themselves. Whatever you believe "something greater" to be, use it. It will provide a source beyond your own ego to draw on when things get tough.

3 – Begin Well & End Well

Planning for a Meeting

Pre-Meeting Checklist

Consider this checklist of questions in planning for a meeting that you will be			
facilitating:			
☐ What is the purpose of the meeting			
☐ What outcomes or results are desired from holding this meeting?			
☐ Is a meeting the best way to achieve these goals and outcomes?			
☐ Conduct a gap analysis: Where are we? Where do we want to be? What role does			
this meeting plan in moving us?			
☐ Where does this meeting fit in with past meetings and future plans?			
☐ Who should attend?			
☐ What will be each participant's involvement (decision maker, decision receiver,			
information source)			
☐ What would it be helpful for me to know about these people? Are there any issues			
I should be aware of?			
☐ The art of the invitation – how can we attract the right participants for our goals?			
☐ What are the decisions to be made?			
☐ How will those decisions be made?			
☐ If the group is not successful in making a decision in the way it chooses, what will			
happen?			
☐ What information (about resources or limitations) does the group need before			
making a decision?			
☐ What other information does the group need ahead of time or at the meeting to do			
its job?			
☐ What are the priority items for the agenda?			
☐ For each item, what are the best processes and steps to achieving the desired			
result?			
☐ How much time would each item take?			
☐ How will the meeting record be kept?			
☐ What worked or did not work in previous meetings that you might want to			
consider for this one?			
☐ Where and when should this meeting be held?			

☐ How far do people need to travel and do we need to allow for that in developing
the agenda?
☐ How should the room be arranged? What are the limitations and opportunities
presented by the space?
What preparations should be made (equipment, supplies, coffee/ tea and break
food, etc)
☐ What information (including the agenda) do participants need to get in advance of
this meeting?
☐ What are the desired records or written products of this meeting?

Agenda Development

Put the big things in first, then build the routine things around that, to avoid people digging into the little stuff too much, and not leaving time for the significant discussions.

Areas to consider including in your agenda:

- Agenda Heading
 - o Meeting Name
 - Location
 - o Date Time
- Participants
- Goals
- For each topic:
 - o Topic
 - o Desired Outcome (Information sharing, decision, other)
 - o Proposed Process
 - Who will present, who will facilitate (if rotating)
 - o Time needed
- Preparation Needed

Room Set-Up and Supplies

Pay attention to how the room is configured for comfort and for setting an appropriate tone. If your intention is to engage the participants in dialogue, arrange chairs in a circle or U so that participants can face one another. The more hierarchical the seating, the less openly people will participate. The exception is you as facilitator. Select a seat at the head of the table or front of the room so that you are best positioned to support all group members in participating fully.

Consider early in the process which facilitation techniques you will be using so that you have adequate easels or wall space, sticky notes, dark/readable markers, etc.

Welcome and Introductions

If you are facilitating a group for the first time, introduce yourself including mention of things like your background (briefly!) and why you are working with them, your personal connection to the place, the content, and/or the people there. If needed or appropriate, contract your role with them, stating what you will commit to and what you are expecting from them.

For all meetings, begin by going over why this meeting matters – these topics at this time. Be sure to list the goals and hoped for outcomes, then review the agenda, reflecting on how it has been designed to support the goals. For longer meetings, consider using a graphic agenda that focuses on the flow rather than particular elements:

Begin with a round of introductions of each group member. It helps to list on a board or flip chart the few points you want the to cover in their introduction, as people often get nervous when it's their time to speak. Introductions can be a great opportunity to help transition people mentally to the meeting or to accomplish meeting goals. For example, for a meeting of outdoor educators, you might ask each to describe a time in their childhood that they felt really connected to the natural world. Even with a regularly meeting group, doing a round of check-ins can help set a positive tone, and possibly bring in new members. You can make it interesting by asking an interesting seasonally or topically appropriate question like "What is your favorite holiday food", or "If you could meet one historic figure, who would you choose?" or "When you woke up this morning and thought about coming to this meeting, what were you hoping we'd talk about?"

Ground Rules / Group Agreements

For longer meetings or regular meetings, it works well to ask participants "What do you need to feel safe and productive in this meeting?" Develop and vet the list from there, choosing only those everyone can agree with.

For one time or shorter meetings, propose a list like the one below. Ask participants if there are any they are uncomfortable with and if there are any they'd like to add. Here's a sample list for a public meeting

Please remember to:

- Be respectful and courteous. Use good manners.
- Speak one at a time. Allow others to talk without interruptions (except the Facilitator who may interrupt to keep the conversation on track.)
- Don't criticize others' contributions.
- Focus on the issues; don't personalize discussions.

- It's OK to "pass" if you're not ready to speak.
- It's fine to build or add onto someone else's idea--you're collaborating.
- Be concise. Try to edit and limit your comments so all will have a chance to speak.
- Check to be sure that the Scribe has written your ideas accurately.
- Come to group agreement about how cell phones will be handled.

Here is a list of other possible group norms you might draw from:

- Seek and find joy in our work together
- Listen carefully for understanding
- If you wonder, ask
- Support each others' learning
- Encourage risk taking
- Speak your truth, even if your opinions differ from what you are hearing
- Avoid assuming or assigning intentions.
- Try to edit your comments share air time. Think "Me then three".
- Check to be sure your ideas are recorded accurately.
- We will assume that anything said here is public information. If you wish something to remain confidential, invoke the "cone of silence" and gain agreement of the group
- Strive to know and understand each other well.
- Make your needs known
- Be aware and sensitive to each others' vulnerabilities
- Assume good intent
- Work through any tension that emerges
- Do emotional check-ins after each big decision
- Acknowledge the need for everyone to be heard
- Don't say anything about a colleague that you wouldn't say to that colleague directly
- Use the 48 hour rule: any concerns must either be addressed with the appropriate person/s within 48 hours or let go of
- Give gentle reminders when any of us stray from these agreements support one another in holding to them.

Decision Making

Supporting a group through a fair and thoughtful decision-making process is one of the key challenges a facilitator faces. Consider the following:

Lose/Lose

- Withdraw
- Strike
- Riot
- War

Sabotage

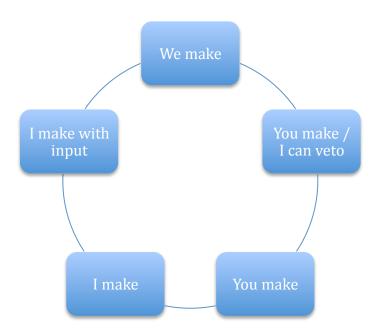
Win/Lose

- Vote
- Administrative or executive decision
- Judicial people's court

Win/Win

- Consensus
- Experiment (try as a time-bounded pilot, then evaluate and gather more info)

As facilitator, it's extremely important to know what the group's expectations are for who will make decisions and how they will be made. One way to frame it is:



In this construct, "I" indicates organizational managers or leaders, "You" indicates group members and "We" indicates a combination of these. As facilitator, you need to determine where the group lies in this decision-making circle on each issue to avoid disenfranchisement and/or frustration.

If "We make", be sure to find out:

- Do they want to decide?
- Do they have the information they need?

If "You make and I can veto", first define and clearly communicate standards and limitations

For "I make with input" information flow is key – if someone asks for input, they must then say what they did with it, and their rationale, so people understand and trust how it was used. To build trust, be explicit about:

- Standards: what makes a good decision, parameters
- Limitations: what makes a bad decision
- Avoid: "I don't know what I want but I'll know what I don't want when I see it".

A big area of confusion is: "We make" vs "I make with input". Bad feelings arise if group says one thing and the manager then decides another. One solution is to go around and ask people individually outside of the meeting so "groupthink" doesn't emerge and so you don't have to go up against group decision made with everyone present

Consensus presents an opportunity to identify other options that both sides may not have thought of, a better solution than either/any of the current options on the table. Consensus does not mean that everyone agrees. Rather, it means that everyone agrees to back it, that they can live with it, or that they choose not to block it. If it's really a shared decision, face-to-face meeting format is very helpful, vs. meeting virtually or by conference call.

It is not appropriate to say that if consensus is not possible, there will be a vote. This just encourages sides to hold out until they think they have a majority, rather than working to find a middle path. It can, however, work to put a time limit at the start on how long the consensus process will last, and set a fall-back, for example:

- Experiment or pilot for a set period, then review outcomes and revisit decision
- Do nothing
- Pass onto a committee
- Down time then revisit
- Minority report
- High majority
- Mediation/judicial/binding arbitration
- Manager or leader will decide, essentially: "If we can't reach consensus, then I'll make the decision with input". This is not negative thinking, but rather provides momentum toward dialogue, responsible followership, and empowerment.

Ensuring Follow-Through

In order to ensure that a meeting achieves its desired outcomes, it is important to capture and disseminate agreements, decisions, action steps, to-do's and remaining questions and to determine a means of follow-through, whether another meeting, building a shared document, or another means. Consider accordion planning:

decisions get made, go out to groups for action, results feed back into group for further decisions.

Some form of assessment is essential at the end of a meeting, both to help guide next steps and to identify what worked well and what could change in future meetings.

Celebrate process! Engagement in authentic dialogue is a key foundation of a vibrant democracy, a healthy workplace, and collective sense of purpose and meaning.

Closing

As the meeting comes to a close, be sure to:

- Summarize agreements and action items, including any follow up needed, and any agenda items for follow-up meetings
- Evaluate meeting
- Ask for any closing comments
- Highlight successes and outcomes related to original goals

Prepare a Meeting Record that includes:

- Meeting, date
- Participants
- For each topic: background notes, result
- Implementation: What, who, by when
- Follow-up: When will group revisit this, who'll be responsible for ensuring we do?

4 - Facilitation Challenges

Emergent Design

The concept of Emergent Design means different things to different people, but generally speaking, anyone responsible for designing something new, whether it's a meeting process and agenda aimed at particular organizational outcomes, or a building, ie, software designers, educational curricula designers, architects and facilitators, all use *emergence* to describe a design process that is responsive rather than inflexible and adaptive rather than planned out from start to finish.

In facilitation work the concept of Emergent Design is helpful because it recognizes that once a group is convened and begins to work, new information, new relationships, insights and ideas are likely to arise that may call for the facilitator to adapt the plan. Pivoting from the plan – adapting to the needs of the group – may be necessary whether the meeting taking place is a one hour conference call or a much longer engagement. The essence is flexibility – the abilities of the facilitator to listen, hear, read the room and adapt so that the group can best reach its goals.

To help triangulate in on this tricky concept, here are some thoughts on Emergent Design from the professional facilitation community:

"I've been pondering emergent design a fair bit of late – comparing it to what I do at the moment, wondering how much further I have to go to be allowing the flow of a workshop to be genuinely emergent. I often plan in detail. I have argued in the past that it's planning that allows me to be flexible: it builds my understanding of the group, of the aims of the day, of a variety of possible approaches – so that when I'm with a group I can change my plan with relative ease and confidence... Until I am sitting in the room with the participants, I don't really have a clear idea of what I want to do, moment to moment. Once I am in the room, I find the next activity usually suggests itself." *rhizomenetwork.wordpress.com*

"The mechanics of emergent design shaping activities and facilitation to respond to the immediate needs of the group, the flexibility of designing on your feet...How much of design is emergent depends. Perhaps 85% is predesigned and 15% is left open... and some workshops I plan the first half and create the last half out of my observation of the group. Sometimes I'll plan only the first session of the five session course and let the rest emerge from my growing knowledge of the group... emergent design is not winging it." *From IAF Handbook on Group Facilitation*

"Lao tzu says 'if you don't trust the people, they become untrustworthy.' The first principle of emergent design is a positive flip of this statement – if you trust the people, they become trustworthy. Trust is a seed that grows with attention and space. The facilitator can be a gardener, or the sun, the water. ... Emergent Design is a strategic facilitation approach based on the natural science of emergence – the way complex systems and patterns arise out of a multiplicity of relatively simple interactions... Emergent strategy is intentional...and successful because it is decentralized, adaptive, and interdependent.... The first principle is trust: a seed that grows with attention and space. The facilitator is a gardener. The facilitator, using the gardener analogy, is a conversation in the room that wants to be had: don't force it, don't deny it, let it come forth." *Paraphrased from adriennemareebrown.net: principles of emergent processes in facilitation*

"I am talking about the combination of adaptation with intention, this is the process of changing while staying in touch with our deeper purpose.... The clearer you are as a group about where you're going, the more you can relax into collaborative innovation around how to get there.... Decentralized work requires more trust building on the front end, but ultimately it is easier, more fluid."

Unlocking the Magic of Facilitation, Sam Killermann and Meg Bolger

Involving Young People

Young people have, until very recently, been one of the most difficult groups to get involved in public meetings. Young people today are enormously active, with school, as well as homework, sports, and many other after-school activities filling most of their waking moments. However, communities and organizations that have been successful in getting youth involvement report that it is well worth the effort. Young people offer a fresh and important perspective, and their participation is a constant reminder to help participants keep the future clearly in mind.

One approach is to train teens to act as meeting facilitators. They might be trained along with the adult facilitators, and then are teamed with an adult to facilitate a small-group session. These teen partners observe and, in many cases, serve as recorder or facilitator for a period of time. The Youth Facilitators not only can be helpful assistants to the adult facilitators, their presence can also raise the awareness of all participants of the abilities of the young people in town. (In some cases, adult partners say that the youth facilitators' skills exceed their own!) And of course, this is an important step in training the active citizens and leaders of tomorrow.

You may wish to enlist local school teachers (social studies, art, and other disciplines) in helping to engage students' creativity in thinking about your community and its future. Look for ways to feature children' artwork, including displays of children's paintings of their favorite places in town, and/or what they think things will look like in the future.

Consider creating a youth advisory committee, with an official place in your organizational or town structure. This can be an attractive option for youth looking to build their experience, and can provide very valuable insight and information.

Facilitating Communities of Practice

Increasingly, people with common concerns, passions and goals are working together in network fashion across organizations, cultures, and landscapes to create something new –whether it be new products, new solutions to complex problems, or new ways of working. In the words of Etienne Wenger who's spent a lot of time thinking about the value of Communities of Practice to the business community, these are "organic, informal and spontaneous." They can be sustained by email chain, video or teleconference or by regular face-to-face meetings. Whether we call them Communities of Practice (COPs) Communities of Learning, Inquiry and Practice (CLIPs); Professional Learning Communities (PLCs), or some other name, the norms and practices of facilitation can play an essential role in their success.

Why Form a Community of Practice?

- Support individual practice and continual learning by:
 - Serving as a vehicle for authentic communication, dialogue, mentoring, coaching, and self-reflection.
 - Fostering willingness to make mistakes and explore new territory
 - Providing a shared context for people to share information, stories, and personal experiences in a way that builds understanding and insight.
 - Generating new knowledge to help people transform their practice to accommodate change.
- Support evolution of the field by:
 - o Tapping a sense of collective understanding, intelligence and creativity unavailable when working alone
 - Capturing and disseminating existing knowledge, identifying solutions to common problems, and collecting and evaluating best practices.
 - Supporting open source approaches as an antidote to our cultural norm of intellectual property
 - Rapidly sharing promising ideas and practices across different programs

 Introducing collaborative processes to groups and organizations as well as between organizations to encourage the free flow of ideas and exchange of information.

Promising Practices of Communities of Practice

Common Purpose

Identify and clearly articulate the shared practice, aspiration, learning goals, and purpose for the group. Allow ample time for this dialogue and capture it in writing, with opportunities for all to continue to digest and consider it for a while, as it will serve as the compass for the work of the community over time. Continually revisit this premise as you move ahead.

Participants

Put out a call to a diversity of possible participants and allow people to self-select into the community based on their attraction to the purpose and their commitment to shared learning in this arena. Over time, consider inviting fresh perspectives into the group as one-time guests and consider intentionally expanding the network.

Group Process

Engage in a participatory process to develop the working agreements or principles that will guide how the group will work and learn together. Consider how to ensure collective responsibility for group momentum, while still ensuring coherent facilitation and governance, possibly through designating a core group willing to steward the group process. Issues to consider include how to support openness to multiple perspectives, safe ways to accept and offer feedback, and how the group will approach the issue of intellectual property.

Meeting

Ensure that participants are realistically able to devote time to the network, during and between meetings. Determine a schedule of face-to-face meetings and identify simple, accessible, flexible IT tools for keeping communication lines open between meetings. Define the roles, activities, group processes, and technologies that will support the community goals.

Practice

Build trusting relationships through story-telling, shared experience, and time liberation. Sustain authentic relationships by engaging in the tension, encouraging each person to speak their truth, choosing their finest and kindest words with a commitment both to honesty and to kindness.

Because communities of practice are voluntary, what makes them successful over time is their ability to generate enough excitement, relevance, and value ("aliveness") to attract and engage members. This can happen by ensuring that the content is both relevant and evolving and by allowing space for discoveries and new insights. Build a meeting design that combines a familiar rhythm with excitement

and new perspectives, evolving and inviting different levels and kinds of participation.

Honor Life Cycles

When Communities of Practice have served their purpose, celebrate them and let them end gracefully, or renew them with a re-defined purpose and new members.

Participation of Local Public Officials

Depending on the topic and goals of your meeting, it may be important to reach out to local officials in public meetings, and to solicit information from officials to make sure that the meeting will be useful to them. However, you need to strike a delicate balance between meeting municipal needs and allowing citizens to express all ideas freely at the meeting. A few tips for doing so are listed here.

Start Early

Call the mayor and other key municipal officials early in your meeting planning process, and arrange to make a presentation to the officials about the meeting. If possible, bring along a variety of local residents to show that the project has broadbased interest and support. Be prepared to answer specific questions about timelines, costs, and projected outcomes. Ask the officials how you can help make the meeting useful to their needs.

You may wish to request that a municipal official serve on your meeting organizing committee. Alternately, you can offer to give them regular updates on the meeting planning process. Be sure to emphasize that you hope they will attend the meeting.

Encourage a Low Profile

Remind the officials that while their participation in the event is very valuable to you, some citizens may be intimidated by their presence. Thus, you respectfully request that they keep their participation discreet, both during the organizing of the meeting and at the event itself. Not having the officials dominating the discussion at center-stage will encourage a more open discussion of town issues, and makes it more likely that new people will engage in local issues.

Additional Tips for Involving Local Officials

- Remember that some elected and appointed officials may initially feel threatened by a meeting. Let officials know that the event is not intended to undermine their power, but to support the municipality in its efforts--to add to the pool of new ideas, new energy, and new volunteers.
- Explain to officials that the meeting will give them the benefit of hearing a wide variety of views and ideas--particularly refreshing because they are expressed in a non-political, non-polarized setting.

• Let officials know that once the meeting is completed and projects are launched, citizens may come to them with projects that need their cooperation and support. For this reason, it will be especially helpful if they participated in and understand the process that created the projects.

Facilitating Conference Calls and Online Dialogues

Especially strong hosting and facilitation are required for conference calls, webinars, and other virtual gatherings, as participants are lacking in the normal visual and facial clues. When possible, use technologies that allow people to see one another's faces, such as Google Hangout or Adobe Connect. It's also helpful to use technologies that allow participants to share visuals, such as Google Docs or shared screen technologies. You may already have your preferred technology (Webex, Zoom, Google Hangouts, etc.), if not, you will find a wide range of audio and video conferencing products from which to choose. This is an area of rapidly developing technology, particularly in video conferencing. The general trend is toward increasing ease of use, greater reliability, lower cost, and expanding features.

A few facilitation pointers that may help:

Communicate Beforehand

- Discuss trivial things by email the week before the call. Discuss important items over the phone one on one, then follow up with the whole group by email and discuss. Whatever's left, discuss on a call.
- If you think it's needed, call people personally before the call to remind them of the phone number and discuss the agenda for the call to make sure everyone's on the same page.

Have a Clear Agenda and Goals

- Preparation is key, especially for conference calls. At the very least, have a set agenda with time limits on each item and one or two goals for the call.
 Without an agenda and goals, calls can drag on forever with endless tangents.
- Be sure to send out the agenda and goals for the call two or more days before the call to give people a chance to respond and suggest revisions.
- Send out with the agenda and goals a simple set of agreed upon conference call ground rules and process norms. These should cover topics such as arriving into the call, speaking over each other, multi-tasking, call preparation, respecting other's voices, in the event of tech. problems and leaving the call.
- The agenda should include a variety of perspectives. If nobody responds by email, make a couple calls. The more people who take responsibility for the agenda the better.

Know Participants' Names

- Since you don't have the luxury of seeing people in person on a conference call, it's crucial for the facilitator(s) to have a list of participants' names in front of them. This is especially important for doing a go-around.
- You should use go-arounds more often on a call than in face-to-face meetings because people can't see when someone is about to speak. When doing a go-around, the facilitator should call on each person by name because there's no circle or order for people to follow. If appropriate, you might want to list their affiliation, too, at least the first time to help other participants remember who's who.
- Calling on a couple of people directly and asking for their input at the start of an agenda item, then moving into free-flow discussion, can help jump start discussion.

Keep it Personal, When Possible

- For groups that meet by phone or online regularly, gather photos of each person and send out a sheet putting faces to names to help participants to picture each other during the call.
- Use ice-breakers such as "what is the weather like where you are?" for small groups, to build a sense of connection.
- Support multiple ways of connecting by using interactive tools whenever possible, such as chat, polls, or shared docs.

Don't Dominate the Conversation

- Ask several different people (in a conversation before the call if possible) to give an introduction for each topic on the agenda so your voice doesn't dominate the discussion.
- Call on people specifically who haven't spoken much throughout the call by saying things like "Emily, what are your thoughts on this partnership proposal?" or "Jian, do you have anything to add on the program campaign idea?" It's really easy for shy or quiet people to be forgotten on a conference call. The best way to combat this is to get people used to hearing a variety of voices.

Keep Moving Through the Agenda

- Provide clear facilitation when switching topics or moving down the agenda
- If someone diverges onto a long tangent, it is your job as a facilitator to respectfully tell them, "Mark, your point is interesting but, we need to stay focused on the topic of organizing our conference for right now. Perhaps we can make time to discuss the other points after we get through our agenda items
- You might find it helpful to appoint a timekeeper for the call whose one job is to let you know when the pre-set time limit for each topic is close to or completely exhausted a few minute warning.
- If you run out of time, suggest to the group that we add a few minutes (5-30 depending on where you're at in the discussion) to that topic. Be realistic

about the time limits when you set them and don't be afraid to table certain topics until the next conference call or onto an email listsery discussion.

Get Commitments from People

- Before ending an agenda item, recap by summarizing what actions the group
 has suggested be taken and asking people to take responsibility for those
 actions (make sure these commitments are in the notes!).
- At the end of the call, ask the note-taker to quickly go through the list of who has agreed to take on what responsibilities so people leave the call with their commitments fresh in their heads.
- Don't forget to schedule the next call (if necessary) on this call while so many relevant people are present. Also, assign a facilitator, agenda planner, and reminder/outreach person for the next call (these can be the same person).

Compile and Share Meeting Notes Real Time or Right Away

- The note-taker should be someone other than the facilitator without an excessive amount to say, and should be designated ahead of the meeting.
- Send the notes out to everyone as soon as possible after the call, or keep them live in a format such as Google Docs or Word Online so everyone can see the notes being compiled and make their own corrections or additions
- Short, summarizing notes are best. The notes should include:
 - o The name of the committee, date, place and time of the meeting
 - o Names of committee members present and absent
 - Decisions made
 - Assignments/tasks and deadlines (include peoples' names)
 - o A brief summary of any updates, reports or announcements

Video Conferencing

For the facilitator, video conferencing has several advantages over audio conferencing:

- Participants have an easier time recognizing speakers
- Facilitators and participants have the opportunity to better read the group through non-verbal communication, including body language and facial expressions
- Video conferencing is closer to face-to-face meetings and has advantages over audio-conferencing in terms of building relationships and achieving outcomes.

Disadvantages include:

- More complex technology not everyone has a video cam
- Cost of technology
- Slower learning curve

Facilitating Webinars

Webinars can be concentration-challenging events, but webinar tools are constantly evolving in function and scope. Below are a few thoughts about keeping engagement up.

- Use interactive webinar tools including chat functions and polls to keep webinars lively and engaging to avoid attention drop-off, multi-tasking and low information retention.
- Webinar tools, to the extent that they make visible areas of agreement of
 disagreement, and can quantify, play to different learning styles. For some
 people who like to process actively, who do well with multi-tasking, or who
 prefer to see conversations in some respect quantified, these tools are
 helpful. For others the polling data may be less useful and it can be ignored
 and unprocessed as the main event/conversation continues.
- One advantage of the chat box is that you can use it to do active listening. Eg: "I am hearing a lot of concern about or interest in xxx." You can summarize statements that are coming out of the group's conversation as a way to capture agreements or trends and patterns in the discussion in real time, if only for emphasis.
- Breakout conversations: in the midst of video conferences or webinars, teams or individuals in various settings can break out together to discuss the points being made in the webinar. These groups can then report briefly back to the whole group. The aim is to move the discussion, to build consensus, and to triangulate, that is get to the best-known current position of the enterprise, and eventually to broaden agreement.

5 – Information Handling

There are three types of information at a meeting, each important:

- Preparation materials
- Facilitation aids / scribing
- Group memory: short and long term meeting notes or minutes

Though often understood as a means of recording meeting notes, flip charts serve primarily as a facilitation aid, helping to:

- Focus attention
- Ensure accurate understanding allows speaker a chance to refine and clarify thoughts
- Help people to feel heard, validated their ideas are up there with everyone else's
- Helps group to come to resolution
- Depersonalizes what's being talked about

Scribe Skills

Like the facilitator, the scribe is a neutral "servant" of the group. The role of the scribe is to create a combined short-term and long-term "memory" for the group, by writing down in full view of the group the main points of what is said, using the words of the group members. Most of the time, participants should not be preoccupied by the process of recording--a record of the meeting just appears, thanks to the scribe, in front of the meeting. A good recorder in no way inhibits or slows down the flow of the meeting. Some facilitators choose to do their own scribing and others choose to work with a partner who scribes, or to rotate jobs.

The scribe should be aware of all of the tasks facilitators are undertaking. While your job as a scribe may seem simple--to capture on paper what people say at the meeting--you are in fact a critical part of the facilitation team, and you must be attuned to the process 100% of the time.

A good scribe is vital to the success of the meeting because:

The flip-chart is the physical evidence of active listening

The scribe's work in accurately recording people's thoughts is every participants' key to feeling she or he was truly heard at the meeting.

The flip-chart helps participants engage more fully

Once a person's idea is accurately recorded, the participant no longer has to hold that idea in his/her short-term memory--the person can relax and move on to new ideas.

The flip chart is the short-term "group memory"

The scribe records ideas as they are generated. The group depends on you to record them accurately, so they can go back to the ideas--in a moment, or the next day--and use them.

The flip chart is the long-term "group memory"

The words on the flip charts will be typed up and may often be used to write minutes or a final report. These reports are often used months and even years later by participants who want to "mine" the variety of ideas that were generated.

The flip chart provides a physical focus for the group

Rather than sitting in a closed circle around a table, channeling their energies toward each other, the participants sit in a semi-circle and automatically focus their attention on the problem as represented by the "group memory."

The flip chart helps keep the discussion moving

Sometimes participants get so excited about their idea, they repeat it, re-phrase it, or won't stop talking about it. In this situation, the facilitator can say "Yes, it's clear that you feel strongly about that. Have we captured your point here on the flip chart?" If the scribe has done their job well, the speaker will see that his or her idea has been recorded, and the group can move on to the next topic.

The flip chart is an important equalizer

Once ideas have been put onto the flip chart, they become the property of the full group, not the special idea of one powerful person or another. This helps depersonalize the ideas and equalize everyone's participation.

Tips For Being an Effective Scribe

- You and the facilitator are a team. Your job is to support each other.
- Listen carefully and fully to the speakers.
- Record all ideas in the speakers' own words. Do not paraphrase or condense the idea unless the speaker approves.

- Don't worry about perfect spelling or beautiful handwriting; the important goal is to record the meaning of the speaker's statement accurately and legibly.
- During the brainstorming portion of a meeting, record all the ideas presented, even if they are in conflict with each other.
- Make sure that the record is neutral--be careful that you don't write some ideas bigger than others, or underline ideas
- If you don't understand what a person is saying, ask for clarification from the person making the comment.
- Encourage participants to review what you wrote, and to correct it when needed. If speakers ask you to change what you wrote to reflect their ideas more fully, accept the suggestions graciously and cheerfully, make the revisions, and thank them for helping to make sure the record is accurate.
- If you are acting in dual role as scribe and participant, remember if you want to add to the discussion, take off your "scribe hat" and put on your "participant's hat."
- Label and number your sheets during the meeting to make transcription easier.
- If needed, serve as a timekeeper to keep process on track.
- To make reading the flip chart easier for everyone in the room, switch pen colors every time there is a new idea. (You can alternate between two or more colors of pens). This avoids the "wallpaper" effect of all the ideas running together.
- Assist facilitator when needed. (The facilitator may need help and encouragement getting started, getting out of a sticky situation, or help in pulling the meeting together.)
- Paraphrase vs use their own words: similarity of language vs affirmation
- ~ 12 lines to a page
- Spelling doesn't count
- Neither does neatness
- Speed does
- Use color to organize headings, sub heads, but if the list is random, use color randomly, at least 3 colors
- Avoid red for content (antagonistic for some) but OK for highlighting
- Avoid orange, pink, yellow in large rooms (not visible)
- Add graphic elements to spark interest or add clarity (trees, stick people, arrows) but don't overdo

Graphic Elements

A picture is worth a thousand words. Graphic note taking, or visual note taking, in facilitated meetings can be a powerful way to show what has been said. As a companion to conventional scribing – capturing the essence of the conversation with words on flipchart – or by itself, good graphic note taking excels.

Graphic facilitation is a specialized discipline and not everyone will feel called to the art and craft, however, you don't have to be an expert graphic illustrator to make use of basic graphic elements. Every facilitator can and should use graphic elements in their scribing. Simple graphic designs including flow charts, boxes, arrows, lines, visual agendas and tables provide a way to organize data and show relationships that can greatly enhance the understanding and the value of the notes, or can be used playfully to raise spirits and focus the attention of the group.

Here are some suggested ways to use basic graphic elements in facilitation.

- Use graphic elements in the form of blank columns, category boxes or tables, calendars to organize written data inputs (what, when, by whom) on flip charts
- Use different-colored stickies and dots arranged graphically to indicate preferences, separate categories, to rank, to show relationships, or to brainstorm ideas
- Use simple graphic elements to indicate timeframe and flow. Eg. Graphic agendas using a large arrow can show the planning pathway of a facilitated engagement from start to end, with stops and benchmarks on the way.
- Use graphic elements to link aspects of strategic planning work or to make distinctions or show like relationships between planning concepts such as vision, mission, goals and objectives. Eg. create a "problem tree" to identify root causes and your organizations mission work.
- Use graphic elements to map relationships, eg: use circle (Venn) diagram to identify the overlap between values, beliefs, and preferences
- Use simple illustrations to add a level of playfulness to flip chart notes
- Use graphic elements to map external and internal resources

6 - Toolkit

Targeting Facilitation Tools, Techniques and Protocols to the Situation

Note: There are, literally, thousands of ways to address various facilitation situations, and many of these are included in the resources listed in Section 8 of this manual. This Toolkit includes a range of tools selected from among my personal favorites. These are drawn from the work of people all over the country, tweaked, modified and shared. I have tried to provide citation where the lineage is clear.

Facilitation Situation	Sample Tools, Techniques, Protocols
1 demitation oftdation	Sample Tools, Techniques, Protocols Affinity Diagram
Idea Generation and	Brainstorming
Development, Promoting	Civic Engagement / Partnership Matrix
Creativity	Convivial Research
	Graffiti Wall
	Head, Heart, Hands
	Heaven and Hell
	Impact Feasibility Assessment
	Mosaic and Vision
	Obstacles and Solutions
	Open Space
	Sense of Place Map
	Take a Stand / Continuum
	World Café
Idea Evaluation and	Affinity Diagram
Prioritization	Fist to Five
	Headlines
	Impact Feasibility Assessment
	Pareto Voting
	Peer Feedback Circle
	Plus/Delta
Decision Making	Thumbs Up
Decision-Making	Orange Line
	Pareto Voting

	The selection	
	Thumbs Up	
Opening a Session	Bingo	
	Group Juggle	
	Heaven and Hell	
	Icebreakers and Warm-Ups	
	Mosaic and Vision	
	Storytelling	
	Who's Here	
Team Building	Bingo	
· ·	Convivial Research	
	Fantasy Vacation	
	Group Juggle	
	Icebreakers	
Dividing into Groups	Sorting Hat	
Getting a Sense of	Fist to Five	
Group Direction	Thumbs Up	
Managing Dialogue	Active Listening	
	Bike Rack	
Harvesting Learning,	Graffiti Wall	
Synthesizing Ideas	Headlines	
	Open Space	
	World Café / Pro-Action Café	
Feedback and	Graffiti Wall	
Evaluation	Peer Feedback Circle	
	Plus/Delta	
	Trio Interviews	
Closure	Airplanes	
	Headlines	

Active Listening

Directions

Focus on Relevant Information: Focus your attention on the person who is speaking and listen carefully to what is being said. (This will not be easy, as the facilitator always has several things on their mind at one time.) As you listen, you will hear information which relates to the topic of your group discussion, and some which does not. Direct your responses to the "relevant" material. This will help you to deal with the irrelevant information by not calling attention to it.

Be Responsive: Listening responsively means reinforcing relevant information by asking further questions. See if you can get the person to express the feelings behind their thoughts. Whenever you receive a contribution or response from a member, find something positive in it and respond. If a statement is off the subject, don't blame the speaker. Keep the conversation moving by taking on the "burden of communication" on yourself, saying something like, "Perhaps I didn't make myself clear. Let me pose the question in another way."

Be Aware: Watch for and respond to both verbal and non-verbal feedback from the group. Attentiveness and active participation from the group mean you are on track. Vacant stares and/or restlessness mean that maybe you should change directions and re-focus.

Make certain that you understand a question or comment before responding to it or trying to move on. For example, you might say, "Phyllis, I think I understand your point. You are saying (X) is difficult for this community. Is that correct?"

Some of the hallmarks of an active listener include:

- Staying engaged--not letting your mind wander
- Repeating back to the speaker what you actually heard them say (rather than what you may have wished they had said)
- Asking probing questions, and allowing the speaker to clarify and expand on thoughts when necessary
- Being supportive of the speaker's efforts to communicate (even if you don't agree with the point they are making)
- Being attuned to non-verbal communication (posture, gestures, facial expressions)
- Searching for underlying meaning
- Being encouraging and making the speaker feel comfortable expressing their thoughts
- Being non-judgmental

This Technique in Action

Active listening is a valuable skill in any friend, family member, or neighbor. It is also one of the most important tasks of a facilitator. Everyone needs to be heard. Too often in life, however, we only pretend to listen to the speaker; in fact we are just waiting for

them to finish speaking, while we are thinking about what we plan to say next. At its best, active listening is a way of putting oneself in another's position, and seeing the world--if only for a moment--from that person's vantage point.

Benefits of active listening:

- Uncovers the speaker's deeper interests
- Permits the discovery of mutual interests that may be common to many
- Spurs creativity
- Changes the speaker as well as the listener

(Adapted from Lappé and DuBois, "The Quickening of America," Jossey-Bass, 1994.)

Affinity Diagram

Preparation

Choose an open-ended question that is important to the group such as: "What are some different ways that might work to get people involved in your community?" Divide participants into small groups of 4-6 people each.

Materials: sticky notes, markers, and one flip chart page per group,

Phase 1

Note: This also works well alone, without Phase 2 Provide participants with the following instructions:

- 5 min In silence, each person answers the question individually, writing one answer per sticky note
- 5min Each person reads their answers aloud within their small group, while sticking randomly onto flip chart sheet. No discussion, only clarifying questions.
- 10 min In silence, group organizes stickies into groups by themes, going for maybe 4-6 overall themes. When disagreements occur, try to understand the other person's perspective, but don't talk!
- 10 min Discuss groupings one by one and give each an evocative name that includes both a verb and an object

Phase 2

- 1. Draw a ring of circles, enough for each theme, and label with cluster names.
- 2. One by one, compare each circle to the others, and identify which theme "drives" the other by drawing arrows. Try to have no two-way arrows, but it's OK to decide that two areas are not in relationship with one another.
- 3. Identify the area with the most outgoing arrows, the next, and the next.
- 4. The one with the most outgoing arrows is the root cause. Discuss whether this makes sense, what it means for your work.

Airplanes

Airplanes is a good activity for closing a training. It gives participants an opportunity to clarify and commit to their next steps, and build support for themselves in moving forward.

Prepare a fun-looking form with the information below. If participants have come in teams, print on a different color of paper for each team. Distribute and give time for each participant to fill it out. At the final moment of the event, have participants stand in a circle with their forms. Direct them to fold lengthwise, fold in the two tips, etc – they will quickly come to understand that they are folding a paper airplane, at which point they can use their own favorite design. Announce that flights will soon be departing, ensure that seats and tray tables are in the upright and locked positions, 3 - 2 - 1 – Blast off! They then pick up one that's not their own (teams pick up one that 's not their team's color) and go find that person to make face contact before departing.

Official Proclamation
Upon my return from (event), I commit to taking this one specific,
concrete step (large or small) to move my vision forward:

I will do it by this date:
Please contact me then to offer encouragement:
Name:
My preferred way for you to reach out to me is:
Email address:
Phone number:

Bike Rack

As with its more well known but less ecologically sound cousin the Parking Lot, the Bike Rack is a sheet of paper posted near the front of the room on which you can write all outlier or tangential ideas. It is important to return to the Bike Rack periodically or at least at the end of the meeting to see whether any of these ideas should now be brought into the main conversation, assigned to future agendas or other groups, or noted in the meeting record as ideas of interest.

Bingo

Bingo is a form of human scavenger hunt in which you find out interesting things about each person in the room, working from a list arranged like a BINGO board. See examples:

Brainstorming

Directions

Ask participants a specific, open-ended question. As they respond, carefully record all of their thoughts on a large flip chart or "group memory." Prompt the group to make sure that the ideas keep coming, and that the group members follow good "brainstorming etiquette". There are several techniques for getting the ideas out. Among the most commonly used:

"Shout it out" This is the least structured form of brainstorming. In this technique, the Facilitator poses a question, and then participants are simply asked to shout out the word or idea that comes to them in response to the question. Ideally, group members' responses "pop" out like popcorn, with some ideas building on the idea before it. The Scribe records these ideas on the flip chart. If the ideas come too quickly, it is the Facilitator's job to ask the group to pause for a moment so the Scribe can catch up.

"Round Robin" In this technique, the question is posed by the Facilitator, and then participants are asked to "silently brainstorm" their answers by writing them on their own private notepad or piece of paper. Once enough time has elapsed so that everyone's writing seems to be slowing down, ask each participant in turn to offer one of their answers. Tell them to offer only ideas that have not yet been said. The Scribe records these on the flip chart. Once you have gone around the circle once and everyone has said one idea, go around again and ask if there are additional, new ideas that no one has said yet. (People are allowed to continue to add to their personal list during the process.) If a person has an idea to add, they add it when it is their turn. If all of the ideas on a person's list have already been said, they can "pass" and move on to the next person.

The Facilitator's and Scribe's behavior are critical in helping the participants feel safe and willing to share their ideas. Here are a few points for leading a brainstorming session.

Facilitator

• Refrain from comment or elaboration. Not only should the Facilitator not comment, she or he will need to remind all participants not to comment on or

- critique ideas. If an idea seems vague or mysterious, ask the participant to say more about it or to give an example.
- Accommodate different personality styles. Be fair to all participants.
- Welcome the wild and crazy statements. They typically loosen everyone up and frequently spark a whole new flurry of ideas. You may even ask, "What is the most outrageous answer you can think of?"
- Encourage the group to "stretch" themselves with new ideas. One way to do this is to count the participants and then say, "We have X number of people in this group, so we should be able to come up with 3X number of ideas." Most people will push themselves to come up with at least three ideas.
- Encourage people to build on each other's ideas. This isn't "stealing" an idea but adding to it--the more collaboration, the better.
- Silence is okay. Resist the temptation to jump in with an idea or comment of your own, and do not allow participants to fill the silence with idle chatter. If there is a silence, do not be too quick to assume that the group has run out of ideas. You might ask "What else?" to test for completion. Sometimes the best ideas come after a pause.

Scribe

- Write down exactly what people say. Do not re-word or "clean up" ideas. Include ideas that seem crazy or are expressed in unsophisticated language. This helps establish an atmosphere of acceptance.
- Clarify if necessary. With long or complicated statements, ask if what you've just written captures what the person said.
- Keep up the pace. Don't worry about spelling! And don't be so careful about handwriting that people's idea-generation is slowed down by your writing.

Tips for brainstorming success:

- Go for as many ideas as possible
- Write everything down
- No one should criticize or analyze others' ideas
- No one should censor or edit themselves--there is no such thing as a "bad" idea in brainstorming
- Spelling doesn't count at this point
- Have fun!

This Technique in Action

Brainstorming provides a creative jump-start to any phase of collaborative planning and implementation. It is not simply designed to create a list--it is a technique intended to generate new ideas through creative group interaction.

Any complex planning or problem-solving process such as a community Vision-to-Action forum requires an alternating pattern of divergence and convergence of ideas. Think of it as breathing in, and then out. First, all possible alternatives are examined (brainstorming step); then, some are chosen (discussion and "narrowing down" step). For each idea chosen, all possible components or strategies are identified (another brainstorming step); from those, a few are prioritized for action. Alternating the creative, open-ended generation of ideas with a structured narrowing down of options ensures that all of the group's energy and inspiration gets channeled into action.

Brainstorming is a way of working together to foster freedom of expression and almost guarantees equality among participants. Brainstorming accommodates differences of

opinion, and it encourages creativity. Incorporating brainstorming into planning and decision-making helps citizens put these lofty ideals into daily practice.

(Adapted from "Brainstorming: A Technique of Creativity" by Judy Warriner Walke.)

Civic Engagement / Partnership Matrix

Many natural and cultural resource conservation organizations attribute their success at building local consensus and momentum to their ability to pull in diverse constituencies from within their community.

Directions:

List the stakeholders in your community (including businesses, municipal boards, ngo's, federal and state agencies, churches, civic organizations, schools, clubs, youth, seniors, etc). Be specific. For each, take a stab at naming their principal area/s of concern (quality after school programs, maintaining the fishery, etc). Then for each, note some possible concrete ways to promote their active and meaningful engagement in the project or program being discussed.

Stakeholders in Your Community – Be Specific	Primary Concerns or Areas of Focus for Each Stakeholder (Your Best Guess)	How to Appeal to this Group to Draw in Their Participation and Engagement

Convivial Research (aka Community Research)

If you have access to a larger group of community members (20 to 60, or more) and have the time to lead them in a more structured activity, try *Convivial Research*, named for the fun and social atmosphere in which it is carried out.

Directions:

In preparation, consider the questions you would find most interesting and helpful to pose to a group of fellow community members. If you could see inside their minds, understand their particular perspectives and set of experiences with regard to your community, what would you like to know about? Develop that list of questions, making it long enough that there is one question for every two people in the group with which you will be working. For sample questions, see below.

Next, prepare a set of Convivial Research Response Forms, using the template found below. If you have a very large group, you will probably want to prepare a second page of the grid as well. Print enough forms so that there is one form for every two members of the group. Glue or write a different question in the space on each form. The more colorful and decorative you make the forms, the more convivial this exercise will seem – which is good for getting the creative juices flowing.

Gather the group and explain that they are going to be conducting important research about the special features of your community. You have arranged an opportunity for them to interview notable experts on the subject – each other! Following the interviews, they will be collating and interpreting the data to present to the rest of the group.

Break group members into pairs, and assign each pair <u>one</u> question. Instruct them not to answer their own question but rather, working as a pair, circulate through the room, approaching all the other pairs—and asking each member of that pair to succinctly answer the question. They should answer other groups' questions in return. Encourage the groups to keep moving, spending no more than a few minutes with each group/question. All groups may not get fully around the room, but they should hit as many other groups as they can, taking brief but clear notes on each answer. Try to allow at least 20-30 minutes for these interviews.

At this point, you can choose to wrap up the exercise in one of three ways depending on your goals and the amount of time available.

- 1. If you want to build a sense of community and buy-in to the project, and have 45 minutes, supply each pair with a large sheet of paper and some markers or crayons. Instruct them to take about 20 minutes to create a poster that graphically depicts their findings, making sure that they include their question on the poster. Tape the posters up around the walls of the room as they are completed, and lead a "gallery tour". Let each group carousel around to visit all of the posters, studying them and raising questions. Ask each pair, to briefly introduce two highlights of their findings.
- 2. If you have less time, conclude the interviews by holding up a newspaper and saying that it is an edition of your local paper from five years in the future. The lead story on the front page, above the fold, is related to their particular question what does the headline read? Give each pair a couple of minutes to develop a headline, then sweep around the room, with groups reading their headlines.
- 3. You can also choose to do a simple report out. Give each pair a moment to read over their findings, then ask each group to share something that surprised them from doing this exercise.

No matter which concluding exercise you choose, be sure to gather the sheets to serve as a data bank. You may want to type the notes and distribute them to each member of your group, so each participant has a copy, and can continue to add on to it. Or you might find a partner group (or a class of students) to edit and bring this Community Resource Directory to publication.

Questions for the Convivial Research activity might include:

- What was something you did as a child that helped to make the world a better place?
- Not counting any of your classroom teachers, who was your most important teacher as a child or youth, and what is one thing you learned from him or her?

- What is one special place somewhere in your community that every local person ought to visit at least once?
- What are two service projects or organizations in your community that would benefit from kid power and provide a valuable learning experience for students?
- Vision 2020: If you could look in a crystal ball and ask one question about what your community will be like in the year 2020, what would you ask?
- Which groups in your community tend to be very involved in community affairs? Which tend not to be very involved?
- What are the biggest barriers to open communication among various groups in your community, including youth, about dreams for the future of the community?
- How do local culture and traditions get passed down to younger people in your community?
- What are two opportunities for leadership roles in your community, both formal and informal? What preparation would youth need to fill them?
- What are three ways that people in your community do or could demonstrate their respect for young people?
- What are three ways that parents and other community members could help in our school, that they are not presently helping now?
- How does the story of our community connect to the "bigger stories" of the region or the nation or the world?
- What are the two most magical, attractive and fascinating places in our community for kids, either on the inside or the outside?
- What is one way you could use local public lands to teach a part of your present curriculum?
- What are three organizations in our community that might be interested in co-sponsoring an educational activity that benefits the community?
- Do you know of any unusual sources for interesting facts or photos about our community's heritage or natural history?
- If you could bring a small group of children to spend an afternoon talking with one of our community's residents, who would you choose? Why?
- What two places would you bring a group of students if you wanted to demonstrate to them the underlying driving forces of the economy in our community?
- What are three ways that members of the Conservation Commission (or other local elected officials in charge of conservation or access to public lands) could help you in your teaching?
- What are two valuable learning experiences that your class could have that could make some nearby public lands a better place?
- What do kids do after school in our community?
- If you were to create the perfect place for people in our community to gather, what would be three features it would include?
- If you could look in a crystal ball and ask one question about the ways kids would be learning in our community in the year 2020, what would you ask?
- What are two businesses in our community that would make good field trip destinations? Why?

Convivial Research Participant Form

Working with a partner, circulate through the group, find another pair and ask each person the question below. You should take about one minute per interview, so remind your interviewees to keep their answers pretty succinct. Write down who you have interviewed and their answers on this sheet.

T 7	\sim	. •
Your	()nes	tıon:

(insert question from list)

Names	Answers

Fantasy Vacation

This humorous activity is used to build personal connections and break down barriers to communication, laying the groundwork for strong professional collaboration in the future.

Directions

Instruct all participants to write down on a scrap of paper their favorite best fantasy vacation (or alternate profession or extreme sport or new artistic endeavor or whatever you choose as a category). They do not put their name on the paper nor share their fantasies with other people. Collect them all. Break everyone into teams of 2-3 participants, arranged in a circle, but warn them that it is likely that they won't remain on that team for long.

Announce "I'll read these twice during the activity, whenever you want, but I can't read them unless there's consensus among all players, on all teams, that you want me to read them." If play is lagging, you can offer to read them before they ask you to, but the consensus rule still applies. One team starts by trying to match somebody with a fantasy vacation. If they get it right, the person whose fantasy was correctly matched joins their team, "stolen" off another team. The "winning" team's turn continues until they get one wrong. If they get the first one wrong, their turn is over.

Turns go in order around the circle, progressing as each team gets one wrong. When the next team goes, they can repeat anybody's fantasy that's already been correctly matched. If they do this, that person joins the new team, meaning that somebody might only be on a team for one turn before the next team goes and steals them. Once a person and their fantasy are "made public," they are fair game for teams to steal whenever it is their turn. It is likely that people will move around frequently. Once on a new team, they are full participants and should play along, trying to help match people with fantasies.

The game ends when all fantasies have been correctly matched, providing fodder for many future conversations around the water cooler.

Fist-to-Five

Directions

Ask a question. Ask participants to hold up the number of fingers that corresponds with where they are along the continuum of answers to the question, with a full five fingers representing a strong "yes" or one end of the spectrum and a fist representing "no" or whatever the opposite end is.

This Technique in Action

This technique is fast, upbeat, non-threatening and very effective when you are trying to get a sense of the group – their prior knowledge about the subject, their comfort level with the material, their level of understanding following an explanation, their tiredness, whatever. I use it sparingly and only when I am prepared to go with the will of the group, whatever it may turn out to be. In other words, if I feel that the group is not really ready to make an informed and well-thought-out decision, I keep the discussion going longer before using a technique such as this, which can act to shut down the dialogue.

I have had great success with this when I think that the group is ready to stop talking in circles and move toward a decision, and also, when I am having trouble reading their body language about physical comfort.

Graffiti Wall

Graffiti is a type of catalyst that sparks the reflection process. It involves asking participants to respond to one or more topics posted on paper around the room. Graffiti is both a public and somewhat anonymous reflection response, and lends itself to having participants compare and contrast experiences.

Directions:

Prepare the room by setting up several sheets of chart paper in different accessible locations around the room. On each sheet of paper, put a topic sentence or phrase, or a dividing line with pros and cons of an issue on each side. Have participants write graffiti on the paper. This can happen during a specifed period, or over the course of a day or longer. Participants should feel free to read others' responses that were recorded prior, which may initiate a reaction or comment. After an allotted period of time convene participants to discuss what has been recorded. Read aloud each piece of chart paper, and allow participants to reflect together on what has been learned.

Alternately, to carry out a "Carousel" post a series of papers, each with a different question or discussion area. Have teams rotate around the sheets, each team with a different color of marker that they carry with them. They can add to the previous teams' comments in their own color.

Group Juggle

This a wild name game, or a team builder for existing teams. The objective is for the team to juggle as many objects in the air as possible at once (nerf balls, rubber chickens, rolls of masking tape, etc).

Directions

Ask the group to form a circle. If this is a new group, go around the circle and have each person say their name. Now call out the name of one person and throw them a ball. Ask that person to call out someone else's name and throw them the ball. Continue until everyone has had the ball once. Now challenge the group to repeat the whole process in the exact same order. Once they have done this successfully, ask them to do it again faster. When the ball has gone to a couple of people, introduce a second ball or other object and yell out to keep the pattern going. Continue to introduce new objects intermittently until there are multiple soft items flying around the group, then stop and let them all make it all the way around.

Tips

Each person must throw to the same person and receive from the same person throughout the activity, stating the name of the person they're tossing to. A toss has a low and high point. A toss is different than a pass or a hand off. Objects that fall can be left alone or brought back into play.

Possible Processing Questions

What were your feelings related to the juggle at the beginning, middle, and end? How would you describe your group's effectiveness at the beginning, middle, and end? What did it take for you to be successful as a group?

What problems were you trying to solve and how did you solve them?

Developed by educators affiliated with National School Reform Initiative.

Head, Heart, Hands / Stewardship Child

Directions

Using butcher paper or several sheets of flip chart paper taped together, trace someone's full body, or draw a person freehand.

Give each participant three sticky notes, each a different color. On a flip chart lay out which color represents which of the following:

Head Cognitive connections; overt reference to topic, term, skill.

What have you learned about this project or topic?

Heart Affect; attitudes, emotions, feelings.

How do you feel about this project or topic?

Hands Behavior; past, current, or future behaviors.

What have you done as a result of this project or related to this topic?

How might you change your behaviors in the future?

Have each participant fill out their three sticky notes. Then stand the group in a circle around the figure on the floor (or with a small group, posted on the wall) and ask each person to read aloud their "head" sticky and stick it near the head of the figure. Repeat with Heart and Hands.

Variation – Stewardship Child:

Head: What would you like an ecologically literate child, or a child coming through our towns school system, to know

Heart: ... to feel?

Hands: to be able to do?

Keep the Stewardship Child posted throughout the meeting as a reminder of the group's aspiration.

Headline Exercise

This exercise offers a quick high energy way to clarify hopes and accomplishments. It can be a culmination or a lead in to action planning.

Directions

Break into groups or use existing teams. Ask participants to imagine reading a newspaper (or other trusted news source) five years from now. The paper features 1-2 headlines (with color photo, above the fold!) about the project that has been being discussed.

How would you like these headlines to read? Write them down.

Ask participants to share their headlines in a dramatic reading, (with much applause).

Possible Follow-up

Open up the discussion. Reactions to others' headlines? Insights? Questions? Elaboration?

Discuss the following in the small groups:

- What needs to happen for us to achieve these headlines?
- What will the challenges we are likely to face and how might we address them?
- What are next steps from this conversation?
 - o Identify and prioritize specific actions
 - o Determine timing
 - o Determine responsible party
 - Set benchmarks
 - 7. Share top ideas with full group.

Heaven and Hell

Directions

Break participants into two groups. Explain that one group is going to make a list of the characteristics of the _____ from heaven and the other is going to make a list of the characteristics of the _____ from hell. Fill in the blank the same for each group: meeting, field trip, public forum, training, whatever it is you are talking about. Have the groups each cluster around a flip chart and choose one person to facilitate and one to scribe. Give them about seven minutes to develop their lists, then discuss.

This Technique in Action

This technique never fails to foster active dialogue and a rich list of ideas. I like to ask this question early in a discussion, then to use the lists generated to shape my training or facilitation of the rest of the conversation as I find that this keeps people more attentive to the content that follows.

Ice Breakers and Warm-Ups

Here are some more exercises designed to help people get to know one another better, or loosen up creativity before a discussion.

If you were to write your **Autobiography**, what would the title be and why?

Write on the inside of your table tent name card **a fact about yourself** that no one would be likely to guess. Read them out loud. Gives people a hook. (i.e., "Faith, who raises sheep.")

Break into small groups. Each group finds the **most unusual thing** that they all have in common. Share with full group. (For example, all had an Uncle Roger they didn't like, all have broken their left wrist, or all have been sprayed in the face by a skunk).

People post one **clue about themselves** (with no name) on a bulletin board. Later in the day, add another clue beside the first clue (more if there is time) and people guess

identities from the clues at the end of the day. People make assumptions and then they find that it's very revealing and fun.

Post cards from the edge. Bring a collection of wild postcards and hand them out. Each person finds something in the post card that relates to their experience (with whatever the group is meeting about) and shares that with the group.

Give out pennies and look at the dates. Go around the room and share something that occurred for you in the year of the penny. It can be something about your education (as a child, a teachers etc.) or it can be just about life. You'll need a good collection of pennies with varied dates.

Skittles. People grab one, there is a guide by color: Yellow, something you're doing this summer; green, something about work; red, an adventure you've had in education, etc. -- *National School Reform Initiative*

Scavenger Hunt. Consider a "scavenger hunt," where each participant is supplied with a list of questions to find the answers to during Forum breaks. You can even offer prize to those who complete all of the answers. Questions might include interesting facts about the town that may be included in presentations; or they could focus on discovering the names of Forum participants with certain traits, such as:

Find a person who has lived in town for over 50 years;

Find a person who has lived in town for under one year;

Find a person who attended local schools;

Find a person whose family has lived in town for over 3 generations;

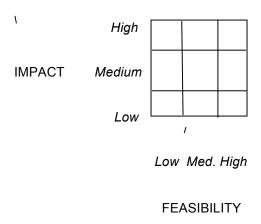
Find a person who has hiked to a local peak or visited a historic site; etc.

Impact/Feasibility Assessment

Directions

The Impact-Feasibility Grid is a tool that can be very helpful in leading a group through a decision-making process about possible projects or other issues. First lead the group in a brainstorm of a list of possible action steps. Record each on the flip chart and ask a group member to, simultaneously, record each idea on an individual sticky note, using a fat marker and abbreviating as necessary.

Draw a large box filling up one page of flip chart paper. Draw two vertical lines and two horizontal lines inside it, so that it is divided into nine equal-sized boxes, making a grid.



Label the left side of the box "Impact" and mark the bottom square "low", the middle "medium" and the top "high." Label the bottom axis of the box "Feasibility" Mark the left square "low," the middle "medium" and the right square "high." Use the sticky notes you just generated, and guide the participants in deciding which of the nine boxes each belongs in.

For each project, ask:

What will be the *impact* of the project? In other words, how much will it matter? Consider a wide range of benefits.

What is the *feasibility* of the project? In other words, How possible is it in our situation? Consider a wide range of factors such as financial, human, etc. The purpose of completing this grid is to make the group's thinking visible. After completing it, encourage the group to stand back and look it, questioning their assumptions and moving any sticky notes in light of the new thinking. Questions you might pose to the group include:

- Now that we've put all the possible ideas up there and you can see them in comparison to each other, are there any that you think should be moved?
- Are there ways that we could change or combine any of these ideas that would move them to a more positive position on the grid?
- Are any of these especially time sensitive, or are there other factors we should consider?

End by selecting the top three ideas, based on those that will have the highest impact and are the most possible to accomplish.

This Technique in Action

I use this technique regularly in local community Vision-to-Action forums and in a multitude of other settings, from staff meetings to personal decision-making. I have found that it is an excellent way to gather ideas and evaluate them systematically, while minimizing the power of individual personalities in swaying the decision. I usually allow an hour and 20-30 minutes for this exercise, but I have been able to accomplish it in less time on occasion. Participants continually comment on how surprised they are at their group's success at moving from a bunch of vague concepts to a prioritized list of three options within such a short time.

Mosaic and Vision

This a lively and fun activity appropriate for the opening of a large public visioning event, that gets people talking about what it is like to live here--what they like, what they don't like, and what they wish for.

Before the activity, be sure that you have two scribes and two tapers ready. The scribes write the words as you tell them to (see below). The tapers tear off the pages of flip charts as soon as they are filled, and tape them to the walls in full view. Remind the scribes that they should label each page with the title of the activity, either "Today" or "Future."

Directions:

Explain that you would like to create a grand list of words or short phrases that describe what it is like to live here in your community today. Explain that there are no wrong

answers to this question--people can just shout out the first thing that comes to their head. This is not a time for speeches, however--only single words or short phrases. There will be no critiquing of anyone's responses. If someone disagrees with something, they can simply add the word that they think is more fitting. Remind people that after all, many things about a community can be true at once: it can be beautiful and ugly, exciting and boring. Then, begin.

Ideally, people will shout out their ideas approximately one at a time. However, if it gets too noisy and people are shouting at once, you may ask people to raise their hands and you can call on them individually. As the group calls out their descriptive words or phrases, repeat each item you hear into the microphone so that everyone can hear it. Then, you will have two scribes, (each with his or her own flip chart), who will alternate writing down the words. You should indicate which scribe should write each word.

For example, suppose your two scribes are named Peter and Katherine. If someone shouts out, "Our community has no activities for youth!" you would say into the microphone, "Katherine, No activities for youth." Then someone shouts out, "We have a beautiful Community Hall!" you would say into the microphone, "Peter, Beautiful Community Hall."

As you go along in this activity, there may be silences when you wonder whether the group has come to the end of its list. It's best to just stand there and act comfortable with the silence and wait for the good ideas that will come out of it. You can also gently suggest categories that may not have been mentioned or fully explored. For example, have people described:

- Natural resources and outdoor beauty?
- Recreational activities?
- Historic buildings and other significant heritage?
- Activities for youth and the elderly?
- Businesses?
- Any unique government programs?
- Educational opportunities?
- The arts?
- Religious and spiritual connections?
- Festivals and traditions?

Keep going until you think that most of the ideas have been voiced, and energy is just beginning to wane. Say "Any last ideas before we finish?" This may spur a few more ideas. Compliment the group for a wide-ranging and creative list.

Now, explain that you will repeat the activity, except you will be generating a list of words or phrases to describe your community as you would like to see it in the future. Tell people not to worry about money or politics too much--this is wishful, positive, "blue sky" visioning--what are some of the wonderful things they would like to be able to see or experience in the coming years?

Go through the activity as above. You may be surprised how many words or phrases are repeated from the first activity--there are things that people love about home and don't want to change! At the end of the activity, thank the group, and again, compliment the group for a wide-ranging and creative list that you hope has opened everyone's minds to new ideas and viewpoints. Remind them that these lists are intended to be a launching point for further discussion.

Obstacles and Solutions

Directions

Divide participants into smaller groups, or work with existing teams. Have each group quickly make a list of several specific obstacles they anticipate in rolling out their project. If you have more time, they can make this list on a large sheet of flip chart paper, divided into two columns, with the obstacles listed in the right hand column. With less time, have them just jot them on a piece of notebook paper. Remind them to write their team's name on the paper somewhere.

Collect the lists of obstacles and re-distribute them among the groups, instructing them to come up with proposed solutions to each other's problems. Again, with more time, they can have a lengthier discussion and work up a range of solutions on flip chart paper, or with less time they can jot ideas on smaller paper. If they have questions and time allows, they can send a runner to the original team with a question. Lead a report out.

This Technique in Action

I have used this exercise in a multitude of settings, from local residents divided into teams from different sectors, to individual consults and I have found that very often people are simply able to see more clearly and creatively when they are solving someone else's problem, other than their own. They have less to risk, they don't have the built in "yeah, but...s", and they are often more cavalier in a positive way. While the suggestions are obviously not thoroughly developed, they can be a very positive jumping off point. They key is to present the exercise in such a way that the suggestions are welcomed and not in any way condescending. I have found that doing it in a fast and playful way, or else in a deeper way followed by interaction between the groups both seem to solve this problem.

Open Space

What is Open Space?

It is a self-organizing practice of inner discipline and collective activity which releases the inherent creativity and leadership in people. By inviting people to take responsibility for what they care about, Open Space establishes a marketplace of inquiry, reflection and learning, bringing out the best in both individuals and the whole.

When to Use It

- Where conflict is holding back the ability to change
- Where the situation is complex
- Where there is a high degree of diversity
- * Where there is an urgent need to make speedy decisions
- Where all stakeholders are needed for good decisions to be made
- Where you have no preconceived notion of what the outcomes should be

Probable Outcomes

- * Builds energy, commitment and shared leadership
- ❖ Participants accept responsibility for what does or doesn't happen
- Action plans and recommendations emerge from discussions as appropriate
- * You create a record of the entire proceedings as you go along

How it Works

The <u>Law of Two Feet</u> means you take responsibility for what you care about -- standing up for that and using your own two feet to move to whatever place you can best contribute and/or learn.

<u>Four principles</u> apply to how you navigate in open space:

Whoever comes is the right people

Whoever is attracted to the same conversation are the people who can contribute most to that conversation—because they care. So they are exactly the ones—for the whole group-who are capable of initiating action.

Whatever happens is the only thing that could've

We are all limited by our own pasts and expectations. This principle acknowledges we'll all do our best to focus on NOW-- the present time and place-- and not get bogged down in what could've or should've happened.

When it starts is the right time

The creative spirit has its own time, and our task is to make our best contribution and enter the flow of creativity when it starts.

When it's over, it's over

Creativity has its own rhythm. So do groups. Just a reminder to pay attention to the flow of creativity -- not the clock. When you think it is over, ask: *Is it over?* And if it is, go on to the next thing you have passion for. If it's not, make plans for continuing the conversation.

How Open Space Works When There is Conflict

The Law of Two Feet gives participants freedom to move at any time to a discussion they care about. Caring creates common ground, and helps to remind participants of higher purpose.

Group Size

To date, we know that Open Space accommodates groups from 5 to 1500 people. It can be run for a couple of hours to 3 or more days; consecutively or over time; at one site or at multiple sites connected by computer and/or phone and video. The longer the space is open, the more transformative the outcomes.

The Steps in Brief

- 1. Select a focusing statement or question for your gathering. It should frame the higher purpose and widest context for your discussion in a positive way.
- 2. Invite the circle of people: all stakeholders or all the people you'd like to have in the room. Include the theme, date, place and time of gathering in the invitation.
- 3. Create the circle: Set up chairs in a circle or in concentric circles, leaving space in the center. Choose a blank wall for the Agenda Wall and label it AGENDA: AM, PM across the top. Set up a table for computers near a wall you label NEWS. Put blank sheets of news print (about quarter size of a flip chart page) and colored felt pens in the center of the circle. Near the Agenda Wall and the News Wall put masking tape for people to post papers on the walls.
- 4. To begin the gathering: Facilitator explains: the theme, the simple process the group will follow to organize and create a record, where to put things up and find out what is happening, the Law of Two Feet, and the Principles of Open Space. Then, facilitator invites people to silently meditate on what has heart and meaning for each of them.
- 5. Opening the marketplace: the Facilitator invites anyone who cares about an issue to step into the middle of the circle and write the topic, their name, a time and place for meeting, announce it and post the offering on the Agenda Wall -- one sheet per

- topic—as many topics as he/she wants. They will be convenors who have responsibility for facilitating their session(s) and seeing to it that a report is made and shared on the News Wall.
- 6. When ALL offerings are concluded, the Facilitator invites people to sign up for what they are interested in and take responsibility for their schedules, using the Law of Two Feet.
- 7. People participate in discussions. The Facilitator takes care of the space. Reporters enter discussion reports in the computers and printouts are posted on the News Wall.
- 8. Closing Circle: all reconvene an hour before closing to share highlights, "ahas" and key learnings in a Dialogue format: simply listening to whatever people have to offer without discussion, or you can pass a "talking stick" for each person to hold as he/she is talking, or to pass along if the person doesn't want to contribute anything.
- 9. Mail out whatever record is created and an address list to all who came.
- 10. If it is a several day gathering, do steps 3 through 8 daily.

From: Anne Stadler, <u>annestad@nwlink.com</u> See also <u>www.spiritedwork.org</u>

Orange Line

Orange Line is an approach to reaching consensus on issues of substance. It boils down to: working with the group, try your darndest to keep as many decisions as possible above the orange line.

- 1. Yes!
- 2. Acceptable I can live with it

Draw an orange line:

3 I	l nood mara	information	specifically:	
J. I	i ileeu illoie	IIIIOHIIIAUOH.	SUCCIIICAIIV.	

4. I am opposed *

^{*} Opportunity for a minority report when consensus can't be reached

ORID – Strategic Questioning

ORID stands for "Objective – Reflective – Interpretive – Decisional" and is a structured approach to decision-making that avoids the usual snarl of convoluted inconclusive conversation and instead helps a group to arrive at a thoughtful and well-supported decision. Developed by the Institute for Cultural Affairs, it is intended to be a means of asking a carefully crafted series of questions to analyze facts, feelings, and potential impacts, and to make decisions intelligently.

The key to success with the ORID technique is to move through the series of questions sequentially, completing one area before moving on to the next. A good facilitator can help this to feel like a natural flow, having crafted the questions in advance, while adapting in real time to the responses. Keys to success include setting aside enough time to move thoughtfully through all four stages, and holding people to the stage you are in, rather than allowing the conversation to meander among all four stages.

The progression is as follows:

Objective

What do we know about this? Ask for objective facts, data, and circumstances that describe current conditions, the situation and environment.

Reflective

How does the information we have make us feel? For example what about it is surprising, exciting, or worrying? Participants identify feelings, but do not analyze them.

Interpretive

What does this mean for our project or organization? Participants voice insights and observations. Examples of interpretive questions include: What if...? What patterns do you see? What are the underlying issues? What have we learned so far?

Decisional

What are we going to stop, start, or continue doing? What steps should we take now? What is realistic given our time and resources?

Pareto Straw Poll

Pareto Straw Poll, (also called Dot Straw Poll) is a process used to get a sense of where a group's priorities lie. I consider it a form of "straw poll" in that it's principle purpose is to gather information which a group can then use to inform a consensus process. It works best when participants have a good understanding of the issues being discussed. It quickly offers a visual display of the group's priorities, jump-

starting the next phase of discussion. Pareto Straw Poll is based on the Pareto Principle, which states that approximately 80% of the value or effect comes from approximately 20% of the effort or cause.

Directions:

Present the full list of ideas being prioritized. Following the presentation of ideas, consolidate like ideas if needed, eliminating obvious overlap. Multiply the total number of remaining ideas by 0.20. If this yields a fraction, round up to the next whole number. Give each participant this number of $\frac{1}{2}$ inch sticky dots. For example, if the group brainstormed 10 ideas, because $10 \times 0.20 = 2$, each group member gets two dots.

(Note: An alternative method is to use" weighted dots" in which each participants gets a strip with three different colored dots on it, say red, green and yellow. They use the red for their highest priority, the green for their second highest priority and the yellow for their third highest priority. The result is a strong visual representation of both the range of people's interests, and where their passions lie. If you choose to offer the group a numerical result in addition to the visual result, count the reds as three points, the greens as two and the yellows as one point.)

Conduct a brief review of what criteria should be considered in determining the best options, or have participants brainstorm to generate a possible list of criteria they can use. Instruct participants to consider the alternative ideas and think carefully about which have the highest value. Have participants place the self-adhesive dots on the newsprint next to those items that represent their personal choices. Determine ahead of time whether participants may place all of their dots on the same item, split them based upon their personal priorities, or use only one dot per item. Discuss the results, telling the group that we have now gathered some data about where the immediate interests of the group lie and we now need to make some decisions about how to proceed.

Peer Feedback Circle

This highly structured conversation allows exchange without the usual impediment of preparing a rebuttal. It involves a circle of exactly three people, who take turns acting as "presenter", with the other two acting as "peers". It works best if all participants have had warning ahead of time to consider a gnarly professional problem, dilemma or opportunity they are facing.

Directions

(3 mins)

Presenter shares their obstacle or problem and a focusing question she/he may need help with. Peers are silent.

(2 mins)

Clarifying questions from peers, with answers from presenter.

(5 mins)

Peers talk about the problem and try to help with the presenter's question. The presenter remains silent and takes notes if needed

(2 min)

Presenter reflects on what she/he heard and what helped, peers are silent.

Switch and repeat process until all participants have presented

Plus/Delta

Directions

On flip chart of white board draw two columns and label one with a big + (plus) and the other with a big (delta). Explain that you want the group to participate openly in evaluating the situation and that you want to fill both columns with thoughts. The plus column will be for things that they feel are going well and the delta column will be for things that they feel should be changed.

Collect ideas from the group in a brainstorming fashion. I find it works best to flow freely back and forth between the columns. If you notice that they are focusing on one column more than the other, prompt them to consider the both, asking targeted questions if needed ("How about the binder?")

This Technique in Action

This technique makes the idea of continual change and improvement discussable and opens the door for positive and constructive assessment. It starts with the premise that nothing is ever perfect and that we seek feedback so that we can work together to improve things for ourselves and for others who follow us. I have found it to be very successful at disarming existing conflicts and launching a sprit of collaboration.

Sense of Place Map

An engaging way to set participants' minds freely roving through the special places of their community is to create a free-form map of the variety of places and ways they connect to their community—a brainstorm.

Directions:

Use place-based teams (divided by neighborhood, ecosystem, watershed, school district or whatever else makes sense for the work you intend to do) and give each group a big piece of paper and some colorful pens or pencils to write with.

Instruct participants to draw a map of their place, their home community. It might look like a geographic map, or it might be more representational – a sun, or a tree with the roots and leaves representing different aspects of life and relationships in the community. They next place symbols on the map for each of the following categories, tailoring the list with additions or subtractions if desired. They might want to make notes along with the symbols to identify the particulars.

- A favorite place in your community to go for a walk.
- A favorite public place to chat.

- A local sacred place or healing place that always makes you feel better.
- An older person in the community whom you appreciate knowing and spending time with.
- Something special each person has noticed in the community that they suspect few people know about.
- A place where one can connect personally with an element of the community's local or regional economy.
- A place where one can connect personally to the human history of your community.

In addition to generating some specific ideas for educational program sites, themes and stories, the exercise will yield a range of possible paths to pursue for more ideas. For example, it might be high time for you to invite that older person in the community for lunch and find out some of the nuances of <u>their</u> sense of place.

Sorting Hat

There are many ways to randomly and quickly divide people into groups, sending people to different parts of the room based on:

Birth month
Birth season
Favorite kind of ice cream
Alphabetically by first name
Shoe color
Other

A fun way to create pairs is to direct participants to get in line in a certain order as quickly as possible *without talking*, for example by length of time they've lived in the town, by birthday, or alphabetically by the state in which they were born. Then start at one end and have each report out their answer to see how close they got. Next bend the line in half, pairing the two ends with each other and so on up the line, forming the dyads.

If you are outdoors, you can use the Earth Oracle: have each person find a favorite small stone and spend some time getting to know it well. Toss them into a hat and shake them up, then dump the hat out onto a blanket or the ground with a small sweeping motion. Choose rocks that have landed near each other (pairs, trios, or whatever group size you want) and hold up each group of rocks, finding the owners – they become the groupings.

StoryTelling

Directions

Instruct participants to introduce themselves by telling a brief story from their personal life that is related to the topic. Encourage them not to think only of stories from their current work, but to think of things they've seen as children or young adults, in their leisure time, or in past jobs. Link the prompt to your goals for the session. In this case, we used the prompt: "What is one time that you have seen excellent civic engagement in a park or protected area?" Give participants a chance to reflect, then ask for a volunteer to go first. Swing around the room in order starting with that person.

Be sure to facilitate very actively, using humor as required in the first few speakers to demonstrate that you mean business in keeping to whatever time limit you have allowed One minute per person total works well, though they can do it in 45 seconds if needed.

This Technique in Action

I feel strongly that personal introductions are an important element in any civic engagement program, setting an open and inclusive tone, acknowledging the value of each participant, and connecting participants personally with the topic. I have had good luck with a variety of prompts. For example, when opening a training session for local teachers in place-based education, I asked each participant to tell about a time when they felt very deeply connected to the natural world. When opening a presentation about the possibility of launching a community Vision-to-Action forum, I asked each participant to tell about one of the things they most love about living in their town. It went a long way to set a positive and hopeful tone.

Take a Stand / Continuum Dialogue

Take a Stand is a form of reflection that involves asking participants to literally stand up for their position. The main purpose of this activity is to promote dialogue and discussion around an issue of interest. In Take a Stand, participants stand or sit depending on whether they agree with a statement. In Continuum Dialogue, participants choose somewhere to stand along an arcing line that represents the continuum between two opposing viewpoints. In each activity, participants are offered the chance to explain why they are standing (or why they are standing where they are) and are given the chance to change their position after hearing others' arguments.

Take a Stand and the Continuum Dialogue are provocative yet non-threatening ways to get to know the people one works with: their perspectives, their beliefs, their opinions on hard issues, and how they think about themselves and others. They are also useful for seeing where people stand on difficult issues that need decisions and for hearing them out with respect and interest. The Continuum Dialogue requires the participants to choose a place to physically stand along a continuum arc between two polar statements that form the beginning and end of the continuum. The Continuum is in an arc rather than a straight line so people can see one another as they speak and listen.

The facilitator of a Continuum is generally a neutral person who is not part of the group doing the Continuum. As a group gets more experienced with this process, an "insider" can effectively facilitate. The reason for an outside facilitator is that it is important for every person in the group to stand on the Continuum arc. Norms for the Continuum are:

- Listen with respect and interest
- Speak with candor
- No one's comments will be challenged or argued
- Thoughtful reflection on others' responses is okay

Tips:

The statements that establish the ends of the Continuum must allow for differences without there being a right and wrong place to stand.

When the topic and the two ends of the Continuum have been established, the facilitator stands in the open side of the arc and asks people at different points in the continuum why they chose to stand where they did. People explain why they chose to stand there with no interruptions or questions. There is no need to ask everyone unless it matters to

hear from every person for some reason, as generally there will be a series of Continuums that make up the dialogue and everyone should be called on at some point to respond.

After several Continuums, or when a group of people is accustomed to them, the facilitator can step back and people in the Continuum can ask others why they chose to stand where they did. The facilitator would step forward and intervene should there be any confrontational questions asked, disrespect shown, or any rebuttal to the person who explained why they chose to stand where they did. When the dialogue progresses to the point of the facilitator stepping back, secondary questions or comments may come forth after the initial "Why did you chose to stand there?" such as, "I expected that you would have stood further toward this end. It is interesting to me to see how much I assumed about you without asking you what you really thought." Or, "I had no idea you had gone through all of that. It explains so much!" Or, "I hadn't thought of it that way. In fact I think I have to move around the continuum closer to you." The dialogue portion happens at this point, always centered around, "Why did you choose to stand there?" and with respectful listening. Sometimes there are no comments, only careful listening to people as they state their reasons for standing where they are, and that is fine.

In a Continuum that will address a hard issue, it is generally best to have several Continuums prior to the "big" question to establish norms of response and to learn about each other in helpful ways. A Continuum should never be a vote, or even consensus. then ask the questions and listen to everyone's reasons for standing where they are. Thus it becomes a learning experience that can lead to a good decision. People calmly listen to other perspectives and grow in understanding their colleagues. Solutions even rise as the Continuum unfolds. As people get accustomed to the Continuum Dialogue, it is possible to take three more steps:

- 1. At the end of a Continuum the facilitator can invite anyone who has changed their mind one way or the other and wants to move, to do so, and explain why they chose to move
- 2. The facilitator can ask if anyone in the group has a Continuum they would like to propose. That person sets up the Continuum and facilitates the discussion with the support of the regular facilitator. This gives participants the opportunity to go deeper than the facilitator might. It requires trust to do this well, although sometimes people want to ask fairly simple questions that just didn't occur to the facilitator. It is the facilitator's responsibility to be sure the Continuum is productive and not a hidden question to get at something or someone.
- 3. The facilitator can give anyone in the Continuum permission to move anyone else to the place they think they should be and tell the whole group why they moved that person there. The person moved can respond and either stay there or go back to where they were. This process gets to the differences between what we know of ourselves and what we project to others. For example on a Continuum like "I think I am a capable leader," to "Leadership is not my strongest attribute," a surprising amount of moving goes on as many very effective leaders do not perceive themselves that way, and learn a lot about how their colleagues perceive them.

Adapted from Eyler, Giles, and Schmiede (1996), and Welch, M. (1999) and School Reform Initiative.

Thumbs Up

This technique is a quick way to get a sense of the group's sentiments on anything from the need for a break to their comfort level with an important consensus decision.

Explain that you will be asking participants to hold out their hand with thumb up, thumb sideways, or thumb down, indicating yes, possibly or no. State the question, then say, "now!" and hold out your own arm. If needed, ask for a few people with different views to state their thinking. Or say that, from this straw poll, it appears that, yes, it is time for some cookies.

Trio Interviews

Directions:

Arrange participants who are working together on a team project in groups of three, and explain that each participant will enact the role of interviewer, responder, and recorder to address the following questions:

- When you think of success in your program, what story immediately comes to mind?
- When and where did it happen?
- Who was involved?
- What was accomplished?
- Why was that accomplishment important?
- What factors contributed to the success?'

Respectively rotate the interconnected roles after each round and record each person's input on a single, shared answer sheet.

This Technique in Action:

This process highlights the mutual interdependence necessary to complete the group task. In doing so, participants build positive relationships through respectful listening and understand more clearly their underlying assumptions of what makes their program successful.

From Bennett et al., 1991; King and Stevahn, 2002, 2004

Who's Here?

"Who's Here?" is intended to be a fun activity to help people "warm up" and get in the mood to participate in a large public event. These questions are intended to give people a sense of the exciting diversity and breadth of experience brought by their fellow citizens. Please note, however: if there are any questions in this list that you feel may be embarrassing or uncomfortable for the people in your area, delete them. Replace them with questions that you think work better for your group. Before the activity starts, you should probably interview a local resident to find out a basic list of the outside communities where most people work and the names of the main newspaper/s, radio stations, local newsletters and other sources of local information

Directions:

Explain to participants that you will ask a series of questions, and that if they can answer "yes" to any of them, they should stand up. Participants may be inclined to raise their hand rather than stand up--remind them that you really do mean "stand up" so they can see each other. We sometimes joke that if people are sleepy, this activity will wake them up!

Ask the following series of questions. After you ask each question, wait for people to stand. As soon as everyone looks around and can see who is standing, thank them. Make encouraging comments such as, "Welcome! So glad you can be here!" Then ask them to be seated again. Move quickly on the next question. Once people get used to the process, it should go fairly quickly, so there is no waiting between questions.

How long have you lived in this community?

- ♦ Stand up if you have lived here less than one year.
- ♦ Stand up if you have lived here between one and five years.
- Between five and ten years?
- ♦ Between ten and fifteen years?
- ♦ Between 15 and 20 years?
- ♦ Between 20 and 30 years?
- ♦ More than 30 years? (At this point, encourage the group will often applaud the older generation. Thank them for coming out and showing their commitment to the future.)

Now let's talk about education.

- ♦ Stand up if you have children in the local schools.
- Stand up if you have grandchildren in the local schools.
- Stand up if you have had children or grandchildren in the schools in the past.
- ♦ Stand up if you are a product of the local schools (attended them when you were young).
- ♦ Stand up if you are currently a student in the local schools.

Where do people work?

Stand up if your main paid or volunteer job is

- ♦ Homemaker or retired
- ♦ Home business
- ♦ For the local government or school
- ◆ For a local business in the community
- ♦ In ... list the four to six surrounding communities where people are likely to be employed.
- ♦ If there is a distant place to which a number of people likely commute such as the state capital, list that as well (and suggest they hook up to carpool!)

Where is the principal output of your work focused?

Tell people to listen to the whole list then choose one. This can be for either their paid or volunteer work and the point is to determine who benefits or where the products they make are principally used.

- ♦ Local
- ♦ County or borough (if appropriate)
- ♦ State or province
- ◆ Region (if appropriate)

- ♦ National
- ♦ International

What is your favorite type of recreation?

List a variety of activities people like in your area, including outdoor recreation, the arts, and other activities. Be sure your list is broadly inclusive--something for everyone!

Where do you get your local news?

List a variety of places that people are likely to get news about local—not national or international—happenings. These may include the following list. Be creative and a little bit playful in listing the "real" sources of news--for instance, in one neighborhood, the best source of news may be the talkative woman who owns the local candy store!

- ♦ Local newspaper/s—list them by name
- ♦ Radio—list the call numbers
- Posters / bulletin boards
- ♦ Organizational newsletters—name a few key ones
- ♦ Police scanner
- ♦ Gossiping at the local post office or store—"word of mouth"

Thank everyone for participating. Make encouraging remarks about what an interesting community this is, and what exciting diversity and breadth of experience the participants have.

World Café

About the World Café Process

The World Café is a structured conversation process allowing large groups of people (20+) to talk together about questions that matter. It is a respectful and inclusive process in which diverse participants can share their perspectives, listen to one another, discover common values and objectives, and build the collective will to move ahead on important matters that benefit the whole. The World Café has been used by hundreds of groups across the globe including large multinational corporations, small non-profits, government offices, community-based organizations, and educational institutions. It is available for public use, and additional information and resources can be found at www.theworldcafe.com or see the *Café to Go* manual at the back of this section.

How the World Café Process Works

Identify key question(s) for discussion that are important to the community of participants and invite people to attend the conversation event to talk about them. World Café conversations generally last between 2-3 hours; there is no limit on how many people can participate because participants talk in small groups at separate tables. Cover tables with flip chart paper and markers. During the event, conversations are held in multiple rounds as people change tables, share insights from their previous conversations and explore new questions.

As the network of conversations and new connections increase, what starts to emerge is: a greater understanding of what Café participants commonly believe, desire and value; increased clarity about priorities and needs, and; a growing awareness of what is collectively possible. For capturing harvest, use flip charts or, butcher paper on a wall with a simple template for capturing the harvest. Arrange 2-3 opportunities to "harvest"

from the group, either by asking to hear randomly from participants in the room, and/or posing harvest questions for each table to respond to and share with room. Have a round or two of conversation, take time to harvest, and then go back into conversation, ending with a plenary share of some kind.

Why it works

- The World Café is an *inquiry* process that invites people to listen to one another, rather than to advocate for a particular perspective or outcome.
- People are invited to share their ideas and listen to what others have to say about the questions posed—when groups are asked to shift tables, individuals become ambassadors of their previous conversation, sharing and building off what they heard and why it mattered to them
- The process encourages collective exploration of broad, open-ended, meaningful questions, maximizing idea generation and collaboration and minimizing polarization and conflict
- People have a positive and productive experience interacting and thinking together, and conveners are left with a wealth of qualitative data, possibilities, potential follow up actions, and a ground swell of communal support and energy for taking next steps

7 – Facilitation Resources

Selected Books and Manuals

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Anonymous. Face to Face Workbook, Resolving Conflict Without Giving In or Giving Up. National Association for Community Mediation.

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Selected Web Resources

The Grove Consultants International. www.grove.com.

Public Conversations Project. <u>www.publicconversations.org</u>.

School Reform Initiative. *Resource and Protocol Book*. www.schoolreforminitiative.org/protocol/

The World Café. 2005. Café to Go! A Quick Reference Guide for Putting Conversations to Work. www.theworldcafe.com

Selected Organizations and Networks

International Institute for Facilitation www.inifac.org

National Coalition for Dialogue and Deliberation www.ncdd.org

Interaction Institute for Social Change www.interactioninstitute.org

The Center for Graphic Facilitation
www.graphicfacilitation.blogs.com
(Ideas, Methods and Tools for Visual Learners)

Master Facilitator Journal
www.masterfacilitatorjournal.com
(Includes free weekly electronic newsletter with tips, etc.)

Open Space World www.openspaceworld.org

(An international network and resource center for open space facilitation practitioners)

Everyday Democracy www.everyday-democracy.org

The Value Web https://thevalueweb.org

"An international network of artists, designers, facilitators, educators, researchers, technologists, writers, social activists, and entrepreneurs who use design and facilitation to tackle the pressing challenges of our time."