

Introduction: The Facilitator's Role

The facilitator is responsible for the process of the meeting — how the participants work together. The facilitator should encourage the participants to use the most effective methods for accomplishing their task in the shortest amount of time.

Facilitators:

- Set a positive tone for discussion
- Remain neutral to the issues
- Keep the group focused
- Keep track of time
- Suggest methods and procedures that can help the group work better
- Encourage participation by everyone
- Educate/inform participants about activities and steps
- Protect ideas from challenge
- Coordinate administrative details
- Record information or supervise its recording

Preparing to Facilitate a Meeting

- Select and prepare the questions you want to ask and write the selected questions on a pad of flip-chart paper. Create one agenda item per question, so you can easily focus the group on one question at a time.
- Schedule the meeting and invite the participants, but do not include the questions you'll be asking in the invitation.

During the Meeting

- **Welcome:** Describe the purpose of the meeting and review the agenda together.
- **Sequential questioning:** Explain that you will be presenting a series of questions and then selecting one person to respond to each one. Only the person responds at a time, but after you've finished discussing a question with the selected person, you may open the floor to anyone else who wants to add their thoughts.
- **Meeting closing:** Share insights and decide how to communicate information.

After the Meeting

- Make sure to discuss whether the information from this conversation should and will be shared.
- Decide on how to communicate the information with the group, then follow up with participants.

Helpful Facilitation Techniques

- Begin with an ice breaker. These should be engaging, short and relevant.
- Have a group review. Discuss what goes well for the organization, what does not go well and what the organization should work on to improve.
- Structure problem solving to define the issue, present the background, generate ideas and come to a resolution.

Action Planning

To execute a successful action plan, the facilitator must first help define:

- "What" the action point is
- "When" the action is to be scheduled and the estimated completion date
- "Who" is assigned against the action
- Progress against the action (leave blank initially)
- To save time, it is often best to leave the assignment of action points to the end of the meeting/event

Rules for effective action planning include:

- Do not nominate an individual for an action, unless he or she agrees to take it on
- Describe actions in precise, clearly understood terminology and with an agreed deadline for completion
- The team must agree that each action is worth doing
- Progress must be tracked and reported on at each meeting or agreed interval

Brainstorming

Brainstorming is ideal for generating many ideas within the group. For effective brainstorming sessions:

- Ideas should flow freely
- Aim for quantity, not quality of ideas
- Try a round robin and have everyone go around and state his or her view on the subject. This aims to increase participation.
- Record every idea clearly
- Do not criticize or evaluate ideas in the session
- Consider an independent facilitator to the group
- If brainstorming is not working, try reverse brainstorming. This involves listing on a flip-chart what NOT to do, and developing solutions from there.

Flip-charts and Focus Sessions

Flip-charts allow for creativity and focus within a group during breakout sessions, but in order for a flip-chart session to run smoothly, the facilitator must:

- Place the flip-chart at the front of the group
- Ensure you have plenty of flipchart paper to hand
- Stand to the side of the flipchart to ensure everyone can see
- While standing to one side, practice writing on flip-chart. If you are right handed you may find standing to the left (facing the flip-chart) of the flip-chart easier
- Write headings, where appropriate, onto the flip-chart to focus the group on the issue or question
- Use clear, bold, large font – ("capitals only" helps some facilitators), to ensure the participants can read easily
- Use different colors and bullet points when writing on the flip-chart. Remember that "red" and "green" are not helpful for group members who are color blind.

How to Make Your Meeting More Effective

- Assign pre-work to CAB members
- Send the agenda before the meeting so attendees can plan what they want to say. This makes the meeting more actionable.
- Allow for conflict and differing learning styles
- Give everyone one to two minutes to think on a question before answering it
- Begin with the end in mind
- Start and end on time. This includes adding a "parking lot" for topics not listed on the agenda that may take up time and can be discussed offline.