

Facilitation checklist

“A facilitator gives the gift of structure to a group.”

Event design checklist

Stage 1) Starting well

- Welcome
- Acknowledgement of country
- Host introduces you, the facilitator
- Housekeeping (toilets, emergency procedure)
- Facilitator gives short self-introduction
- Purpose statement + clarify negotiation space
- Ice breaker questions to engage participants
- Ice breaker introductions
- Name tag check
- Sketch the running order and hand out copies.
- Propose ground rules

Stage 2) Inform and inspire

- Data and research
- Inspiring ideas!

Stage 3) Group work

- Questions are open, positive
- Variety and physical movement!
- Give written instructions for group work

Stage 4) Ending well

- A 'final word' from all
- Thank everyone warmly (and celebrate)
- Give a commitment to the next step.
- Anyone special to thank?

And now, the details

(1) Start with a clear, simple purpose statement

“The purpose of this...

[workshop/forum/meeting]

Start with common values:
“Values unite, interests divide.”

is to contribute to...

[insert values at stake e.g. “a happy productive team”]

by increasing/improving/establishing/devising...

[insert desired outcomes(s) e.g. “better communication and a supportive environment”].

Together we’ll create...

[a plan/strategy/model/recommendations]

to be acted on by...

[insert who is responsible for acting on the plan, if known e.g. “our team”.]

[give an implementation time] e.g. “over the next 2 years”]

Check-off: [e.g. “Are we happy with that?”]

(2) Clarifying the ‘negotiation space’

Setting boundaries creates clarity and avoids conflict. Clearly state significant matters which are outside the scope of deliberation. For example:

- timetable and time span
- available budget
- statutory requirements
- who is the final decision-maker
- policies set in stone that can’t be altered.

Check-off: [e.g. “Are we happy with that?”]

(3) Icebreaker ideas

In the first 10 minutes everyone has a chance to introduce themselves to at least 2-3 other participants.

Use fun, active icebreakers:

'Unexpected facts': "Stand up. In 4 minutes, how many people you can meet and find something you have in common."

'Two truths and a lie': Everyone thinks of two truths and a lie about themselves. "In 4 minutes how many people you can meet and guess their lie."

'Hands up': "Hands up if you came by car? By foot? By train? By bus? By bike?" (Or any other relevant facts).

'The room is a map': Everyone moves to where they live. Then move to where they work. Then move to where their clients live.

More icebreakers here: [Book of Facilitation Tricks](#).

(4) Ground rules

Propose ground rule respectfully. For each ground rule: "I'd like to suggest XXX ground rule. Is that OK?" Then pause for a response.

Examples of ground rules: phones off / listen to each other with respect / positive remarks only / one person speaks at a time / no personal criticism / confidentiality. Propose time limits if you think there may be over-talkers.

(5) The inform and inspire stage

What information and inspiration do participants need to be able to deliberate accurately, without misconceptions, and inspired by great examples?

Make a list. Think about baseline data, scenarios, social research, good examples, inspirations, innovations.

Prepare this material and present it [say, a 10-20 min slide show].

Then follow with a short facilitated discussion to embed key ideas: asking, for example, "What occurs to you at this point?"

(6) Your focus questions

Think carefully about the language of the focus questions: they are the crux of the whole event! The exact wording can have a big impact on the ideas, either enlarging or narrowing the range of possibilities.

Questions should be open and positive!

A great all-purpose question:

"What would make the biggest difference to [the desired outcome]?"

Check-off. If necessary, accept amendments.

(7) Checklist of methods

Basic brainstorm

"One idea per Post-it note, written big and clear."

Brainstorm a drawing

One person on each table visualises the ideas.

Prioritise with dots/points.

Spending fake money is fun!

Prioritise with a matrix

After the brainstorm select two criteria, for example *urgent versus important; impact versus cost; passion versus ability to make a difference*. A good way for participants to learn from each other as they collectively locate each idea on the matrix.

A form-like template

Each participant/table has a form-like template with pre-formatted questions that participants fill in - great for collecting complex knowledge that takes a lot of thought.

Mapping

Can the ideas be geographically organised?

Give a list of options

A list of starter ideas/components is a great way to speed up assembly of complex solutions.

Assemble a prototype

Can participants depict their solutions with craft materials, Lego, or a big drawing.

Roleplay / hypothetical

A fun way for participants to learn about complex situations and systems before deciding on strategies.

What to bring Checklist:

- PA needed?
- Printing: manuals, templates, running-order,
- Slides: running order, instructions
- Name tags
- Post-it notes
- Flip chart paper
- Marker pens
- Something that goes 'ding'
- Adapters, charger
- Backup on thumb drive and Dropbox
- Creative props, prizes

THINK ABOUT

Silent time vs talk time

Have a mix of silent activities and speaking activities.

Silence is the best way to get ideas down quickly in a brainstorm.

Talking in pairs helps people formulate complex ideas or clarify half-forgotten lessons.

Talking in tables of 5-6 helps people learn from each other, formulate their own positions, and make commitments. If commitment matters, let people talk!

Reporting to the whole room at the conclusion of an activity or session.

Beware: Talk is time consuming and often leads to extroverts dominating. Set time limits. Always appoint table facilitators to ensure fair discussion.

Gravitas vs hilaritas

Playfulness and light-heartedness are vital. Plan how you'll build moments of light relief into the event.

Physical movement!

Take every opportunity to move people around: stand them up, swap buddies, swap teams, and invite them to stretch and walk around during the day.

Difficult participants

See my [Facilitating Difficult Participants 2](#) pager.

Let conflict come out. Acknowledge with respect: "Thank you, that's a good point." Park their ideas so all can see. Don't let it get personal. Make sure they are heard and understood "Is that what you mean?" Ask the group for a ruling: "Should we allow more time for this discussion?" Take time out to cool off.

Facilitate with Confidence training

with Les Robinson Two mornings, 10-11 May 2023

Safe practice in a friendly environment.

Details at www.enablingchange.com.au/cocreate.php

Automatic stuff we just do

Always be curious. If you're critical or take sides you'll lose authority.

Safety: Protect every participant, without exception. Actively respond when someone is uncomfortable. Working in 2's helps shy people participate.

Make action requests: "Please stand." "Raise hands if you agree." "Turn to your partner and..."

Reflective listening: Bouncing participants' ideas back to the room checks-off that they've been understood and creates clarity for all.

Checking-off: "Is that OK?" "Does that work for you?" "Are we good?" And pause for a response.

Silence: Your silence impels others to respond. It gives them, and you, time to think. **Do it often.**

Step back: When all are intently participating, stand back and enjoy the moment.

When attentions lapse: Move on. "Let's stand for a stretch"; "Let's come back to the topic"; "Please stand, swap seats and find new partners."

Finish on time: watch the clock and finish when you said you would.

Flexible: No plan is perfect. Don't worry if you need to improvise on the fly.

Experiment: Try new stuff and see what happens!

Just do it!

Facilitation is a learned skill.

Confidence comes with practice!

Start with small groups. Put time into planning. Don't beat yourself up about mistakes - that's how we learn.

