



# Facilitation

## PLANNING



**Peyton Beattie, Ph.D.**

Community Development Extension Agent I

UF/IFAS Extension Clay County

pbeattie@ufl.edu | (904) 284-6355

## A Facilitation Plan

Planning a facilitated meeting or discussion might be the most important step of the facilitation. A well prepared foundation will lay the groundwork for a successful meeting or discussion. Items that should be considered in the planning process include: who will be a part of the facilitation team (yes, a TEAM) and developing pre-meeting materials.

## The Facilitation Team

A facilitation team includes at least two people: a facilitator and a notetaker. The role of the facilitator is to be the group's biggest advocate and their main objective is to "support everyone to do their best thinking" (Kaner, 2014, p. 32), and they neutrally guide the group while actively managing the facilitation process (Haskell & Cyr, 2007). The facilitator has four functions which include: (a) encourage full participation from the group, (b) promote mutual understanding between group members, (c) foster inclusive solutions that benefit all parties, and (d) cultivate a shared responsibility among group members to be engaged in the decision-making process and remain engaged after the meeting or discussion (Kaner, 2014). The facilitator has a large role in the facilitation process, and it is helpful for the facilitator to have a notetaker to assist during the meeting or discussion. The role of the notetaker is to accurately and visibly capture what the participants in the group are conveying. Skills of a notetaker include: ability to think quickly and summarize thoughts, legible handwriting, and the ability to think and write quickly. Other members of the team could include timekeepers, virtual room monitors (if meeting is virtual), or co-facilitators.





## The Pre-Meeting Process

A role of the facilitator is to also design the meeting or discussion (Haskell & Cyr, 2007). In order to design meetings effectively, some pre-meetings with engaged individuals is important.

### Pre-meetings:

The purpose of having pre-meetings with engaged individuals is to gather information that would better help the facilitator design a process that works best for the group. Pre-meetings with the initiator of the meeting or discussion should be used to help the facilitator determine the goals of the facilitated discussion or meeting, who will be present for the meeting or discussion, and what dominant or shy personalities to be aware of. That research will help the facilitator design a process that meets the initiator's goals and encourages participation from all individuals involved. If there are other invested groups related to the larger group, it could be helpful to engage them in a pre-meeting to be as informed as possible about the group and the group's goals. Other invested groups could be board of directors, advisory committees, associations, or foundations.

### Meeting Design:

Haskell and Cyr (2007) provide a Roadmap for Facilitation Success that outlines what should be included in a facilitated meeting or discussion. The 10 steps in the roadmap include: (a) an opening or introduction, (b) clarifying objectives which share the purpose of the meeting/discussion, (c) share the role of the facilitator, (d) overview of the agenda or process, (e) group agreements are developed and/or shared, (f) the body of the meeting where the work the group was gathered to accomplish occurs, (g) recap the outcomes that were derived in the meeting/discussion, (h) confirm consensus to ensure everyone is comfortable with the progress made, and (i) outline next steps. These pieces are put together to develop a process agenda.

## Summary

Planning for a facilitated meeting or discussion is a key piece to making sure the event is successful. Developing a qualified facilitation team and designing a process that meets the needs of the initiating group is critical. Other items to consider when facilitating include: (a) facilitation basics, (b) creating the ideal participatory environment, (c) determining effective group processes, and (e) building a facilitation kit.

