

How to be a Facilitator



Many people are called on to act as a facilitator for a range of events, meetings, team events, strategy sessions to name but a few. This can be daunting as it can easily take us outside of our comfort zone especially as being a *facilitator* is different from a chair person, a trainer or a teacher. If you keep these few basic concepts and utilise a few of the tools in this Booster you will be facilitating like a professional in no time.

What is facilitation

Facilitate comes from the Latin *facilis* and *means to make easy*. If you remember that that is your primary goal to make the process of the conversation or meeting easy or run smoothly.

The other key principle of facilitation is that the facilitator is responsible for the *process* not the *content*. This means you, as the facilitator need only worry about HOW the meeting goes not WHAT is discussed. Your job is to guide, question, summarise, gather, collate, help sort and manage thinking and information. So, technically, you could facilitate a meeting on which you knew nothing about the content – but I wouldn't recommend that, at least not at the beginning.

1. Start at the very beginning...

Any session needs to start with preparation, and your job as the facilitator is to design the process to make the meeting run smoothly and effectively. This usually starts with a question: “*what do we want by the end of the session?*” This might be: a range of ideas to cheer up the waiting area to we need to review our clinical governance. Whatever your end point, and it is vital that this is clearly articulated and agreed upon, your job is to arrange the right set of the following tools to help your colleagues get there.

2. Gathering Ideas

However you gather ideas whether it's traditional brainstorming, drawing pictures or Sticky Notes there are some key rules:

- i. **Defer judgment**, you can sort and evaluate the ideas later
- ii. **Encourage crazy ideas**, one of them might just spark a winner
- iii. **Build on the ideas of others**, try to use “and” instead of “but.”
- iv. **Stick to the topic**, unless you have endless time, keep control
- v. **One conversation at a time**, as above
- vi. **Capture things visually**, don't pretend you will remember (you won't), write them down, draw them
- vii. **Quantity not quality** (at this stage), get as many ideas as possible.



Traditional **Brainstorming** techniques are perfectly sound and great for gathering lots of ideas. Ask your question and scribble away anything and everything your audience calls out. The downsides with this approach are that it is difficult to manage the information later and quite often you only hear from a few, extrovert, loud delegates and not necessarily from the entire audience.

Using **Sticky Notes** is a better way to get the shy and retiring in the group to have as much chance as putting their ideas forward as the loud ones, there is also an element of anonymity so you might get a little more honesty or wackiness. The trick here is to give each delegate a pile of Sticky Notes and ask them to write as many ideas or responses to the question as possible, each on a separate Note.

All the inputs can now be gathered together and placed on a wall. Remember, unlike traditional brainstorming other's ideas and inputs have not been shared out loud so you need to give everyone in the room an opportunity to read everyone else's.

3. Managing the Output

You may well have 80-100 Sticky Notes with ideas on now, which is probably too many and some will be similar or even duplicates. This is when we ask the group to **Group** the information. Ask the team or a subset of the team to move Notes around into similar responses or subject areas. This is best done in silence. You will end up with between 5-9. To help it is wise to ask the group to **Headline** each grouping ideas for reference or to use later with another Sticky Note, perhaps in a bold colour.

So now you have gone from 100 to 7 ideas or areas of focus. This might be too many or perhaps you need the group to prioritise. This is where **Voting** is useful. Pose a question such as: *"Which of these ideas will have the most impact?"* and allocate each delegate 3 votes (a vote could be a sticky star or dot or a dot drawn with a marker pen). Invite them to "spend" their votes answering the question. They can split their votes across 2 or three areas or if they feel very strongly about one, they can spend all three votes on one. This will give you a consensus of the top idea, the top three or will help you create a prioritised list.

4. Testing Commitment

Sometimes it is useful to check the understanding of the people in the group of the subject or the actions to be undertaken. This is where you can use a scale; ask *"On a scale of 1 to 10, where 1 is 'not at all' and 10 is 'completely understand and happy to explain to others', how much do you understand the challenge?"* You can go around the group asking for their number, ask each to place their number on a Sticky Note and pop it on the wall or even define the right hand side of the room as 1 and the left 10 and ask people to stand, on a scale at the right position to indicate their number. You can use this technique to test commitment to agreed actions too. Ask *"On a scale of 1 to 10, where 1 is 'not going to happen' and 10 is 'I will start tomorrow mornings', how likely are you to deliver this change?"*

A great question to ask to those in the "lower score" is *"What would it take for you to be an 8 or a 9?"*



5. Ask don't tell

Remember you are the facilitator, your job is to ask the questions and move the conversation on, not input. If you feel you need to input, signpost it. Say something like: *"I am going to take my facilitator hat off for a moment, as I have an idea"* . *But don't overstay your welcome, get back to leading the process as soon as you are done.*

So:

- Understand the challenge
- Design a clear process
- Gather lots of ideas
- Narrow them down
- Gain agreement
- and remember you are responsible for the process, your audience are responsible for the content.

6. One final word of advice

Be really clear when you set a task or ask a question. With a number of people in the room the opportunities for misunderstanding are multiplied, so be really clear, ask one question at a time and, for best results: write it down for all to see.

