



Modules 5 & 6

Meeting Facilitation Workshop

Practice Session on Meeting Facilitation Skills



Meeting Facilitation Workshop

Objectives:

- To increase knowledge about facilitation techniques for effective meetings.
- To practice techniques to promote participation, productive discussion, decision making, and action.

<u>Program</u>	<u>Time</u>
📝 Welcome, introductions, and overview of the workshop	20 minutes
📝 Group brainstorm: Characteristics of effective meetings & meeting facilitation	15 minutes
📝 Mindset for collaboration and facilitation	20 minutes
📝 Facilitation techniques to foster productive discussion and decision making	35 minutes
<i>Break</i>	<i>10 minutes</i>
📝 How to preplan a meeting to make facilitation easier, and techniques to move the meeting forward	65 minutes
📝 Evaluation and wrap up Final go around – one idea you gained from this workshop, and one idea you are going to use right away.	15 minutes

This curriculum is part of the *Building Comprehensive Solutions to Domestic Violence* initiative of the National Resource Center on Domestic Violence, funded by the Ford Foundation.



MODULE #5

Meeting Facilitation Workshop

Trainer Instructions

Preparation

Pre-requisite Modules: Collaborative Mindset Workshop
Negotiation Workshop

Number of participants: 5 minimum
30 maximum

Time requirements: 3 hours

Room arrangements:

Fewer than 20 participants: arrange tables in a horseshoe with chairs on the outside of the horseshoe and flip chart and easel in the open space.

20-30 participants: Use separate tables – 5-6 participants per table. Arrange tables so that all participants can see the flip chart and easel in the front of the room.

Materials:

- Flip chart & easel
- Markers
- Masking tape
- Colored round stationery labels (dots) cut into strips of 3 and 5 (one strip of each per participant)
- 5-6 prizes – for participants in the group whose agenda is voted most likely to succeed (one bag with several items is ideal)
- Extra pens (for participants)
- Name tents (for participants)
- Registration form
- Participant handout packets

Participant packets:

- Handouts #5-1 through #5-11
- Workshop Evaluation form (Handout #5-12)



NOTES

❖ WELCOME, INTRODUCTIONS, AND WORKSHOP OVERVIEW
Time: 20 MINUTES

The 20 minutes is based on starting 10 minutes late. If you start on time, you will have some flexibility with time during the workshop.

Welcome everyone.

Ask participants to introduce themselves, describe their work in domestic violence, and note briefly one thing that they like the most about meetings.

Review the objectives for the workshop and the program (Handout #5-1) and deal with any housekeeping items.

❖ GROUP BRAINSTORM: CHARACTERISTICS OF EFFECTIVE MEETINGS AND EFFECTIVE MEETING FACILITATORS
Time: 15 MINUTES

Ask participants to turn to Handout #5-2. Let's take 10-15 minutes to brainstorm ideas about what makes meetings and meeting facilitators successful.

This is a brainstorm, so all ideas are welcome. Jokingly explain that there will be no eye rolling, boos, applause, or interruptions. And each person suggests one idea at a time (not 2 or 3).

Groups with fewer than 20 participants: This is a large group brainstorm. Ask that no one speak twice until everyone has had a chance to suggest one idea. Ask for a volunteer to tape flip chart sheets to the wall as you write. Record all ideas.

Groups with 20-30 participants: Brainstorm at individual tables – give them 3 minutes. Then ask for a volunteer to tape flip chart sheets to the wall as you write. Create a list on flip chart sheets by taking one different idea from each table until all ideas are recorded. This will create one list of ideas.



NOTES 

Do not stop to ask for clarification or to discuss any items. This fast-paced brainstorm exercise is designed to engage participants in thinking about characteristics of effective meetings and meeting facilitators and to create safe space for all ideas. The list does not have to be complete. If you see that something major is missing, just say you're taking a turn during the brainstorming and add it (do not do this more than 2-3 times).

After the ideas are recorded, ask if anyone disagrees with any of the ideas. If so (including any the trainer disagrees with), bracket these ideas with red marker and ask for a brief statement about the disagreement. Tell participants that we will address these points as we go through the workshop.

Don't allow debate to sidetrack the program. Keep moving. Later on in the workshop, participants also may want to add items to the list, so keep the lists posted throughout the workshop. Remember to come back to any red bracketed items before the end of the workshop – ideally, with information from the workshop that clarifies whether the idea is appropriate for the effective meetings and facilitation list.

Ideas about effective meetings

- Everyone understands the purpose of the meeting.
- Active participation.
- A great facilitator.
- Well-organized.
- Written and timed agenda.
- Stays on subject.
- Stays on time.
- Doesn't get bogged down in unnecessary discussion.
- Open discussion.
- Clear decision making process.
- Items that need more discussion are delegated to a smaller group for discussion.
- Work gets accomplished.
- A sense of completion and meeting sets the stage for what comes next.
- People are informed about the content to be covered.
- People have the information they need to participate effectively – in advance.
- People read their packets.



- People respect each other.
- Comfortable physical environment.
- Breaks.

NOTES **Ideas about characteristics of effective facilitators**

- Keeps group on time and on task.
- Doesn't allow unproductive discussion.
- Keeps the meeting moving.
- Follows a structured process – doesn't make it up as she goes along.
- Is firm and kind in handling disruptions.
- Group-centered rather than self-centered.
- Enjoys facilitating and is fun to be around.
- Fosters participation and discussion.
- Fosters decision making when the group needs to decide something.
- Uses effective techniques to help the group engage in productive discussion and decision making.



Characteristics of Effective Meetings and Meeting Facilitators

EFFECTIVE MEETINGS

EFFECTIVE MEETING FACILITATORS



NOTES**❖ MINDSET FOR COLLABORATION AND FACILITATION****Time: 20 MINUTES**

Ask participants to turn to Handout #5-3 and review with them the characteristics of the mindset for collaboration, pointing out the one addition for facilitation. Explain this facilitation role.

Ask participants to turn to Handout #5-4 (Facilitation Mindset Case Studies). These case studies are designed to stimulate participants to think about their mindset when they facilitate a meeting and to apply the mindset characteristics to facilitation. For each case study, ask someone to volunteer to read it. Then encourage participant ideas in answer to the question for each case study.



Characteristics of the Mindset You Need for Successful Collaboration

- ◆ **Proper Facilitation.** Accept your role as facilitator and understand that you are not the decision-maker, boss, or resuer.
- ◆ **Vision.** Define your vision and goals – what you want to accomplish to achieve a successful outcome.
- ◆ **Positive Attitude.** Focus on possibilities – what you can do together – while understanding limitations that may exist. Avoid being cynical – don’t decide in advance that nothing can work.
- ◆ **Willingness.** Be willing to create a recommendation, agreement, and/or plan of action with the other parties involved.
- ◆ **Openness.** Be open to being influenced by others. There may be more than one right way. Be neither doormat nor immovable object.
- ◆ **Curiosity.** Maintain a curious/investigating attitude about others’ needs, power, mandates, mission, barriers, and opportunities to move forward. Avoid blaming, “shoulding,” and/or making assumptions about others’ motives and meaning.
- ◆ **Connections.** Look for connections rather than differences – the “fit,” meeting your needs and others’ needs.
- ◆ **Confidence.** See yourself as a significant partner with confidence in your ability to “hold your own” when situations are confusing and complex.



Facilitation Mindset Case Studies

Case Study #1

After a lot of discussion, the work group has decided to proceed with four projects. Everyone agrees except Rose, who thinks this is too much to undertake effectively. The group has tried to convince Rose that this is the best way to proceed, and now they are growing impatient with her opposition. Nancy, the facilitator, values Rose's opinion more than that of anyone else in the group, so she suggests to the group that Rose is probably right. It really is too much work. Then she asks the group, "How do you want to proceed?" No one speaks.

What is Nancy's mindset as a facilitator? How could she have handled this situation more effectively?

Case Study #2

Brenda is facilitating a meeting, putting ideas on flip chart pages. Julie makes a suggestion, and Brenda says, "Let me summarize what you are saying." She writes down an idea. Julie says, "That's not at all what I meant."

What is Brenda's mindset? How could she have handled this situation more effectively?

Case Study #3

The community coalition meeting is going around and around, getting nowhere. The county attorney has suggested that they go to the legislature to advocate for funds for drop-in day care so that women will have a place for their children to stay when they come to court. The local domestic violence program responded that this funding had been available, but the state legislature eliminated it 6 years ago. Various coalition members have made comments about the problems with the state legislature, the need for day care, and have described the problems women are facing. No one agrees about what to do. Mindy, the facilitator, grows more and more frustrated. Finally, in desperation, she says, "Okay, there's no point in discussing this any longer. The state legislature already has taken away this money."

What caused Mindy's reaction? How could she have handled this situation more effectively?



NOTES 

❖ **FACILITATION TECHNIQUES TO FOSTER
PRODUCTIVE DISCUSSION AND DECISION MAKING**
Time: 35 MINUTES

Ask participants to turn to Handout #5-5 (case study). Read/act out the case study.

Refer participants to Handout #5-6 for a list of participation techniques.

Ask participants how they could use the discussion questions technique to have a more productive discussion of the education initiative issue in the case study.

Skip the brainstorming and dots exercise and the right brain activity – explain to participants that they will do these in a few minutes.

Then discuss other participation techniques that could be used (Handout #5-6).

Next ask participants to turn to Handout #5-7, a second case study of the education committee. Conduct a brainstorm and dots exercise to create ideas about options for the local domestic violence program in responding to the education initiative situation. (Explanation of this exercise is Handout #5-8. Conduct the exercise first and then go over the instructions – it's easier after experiencing it.) The exercise will take approximately 10-15 minutes.

Then ask participants to select an animal, image, or object that symbolizes a successful resolution. Ask participants to share their ideas. Explain that this kind of exercise (and work with arts and crafts for groups that are open to such activities) taps another perspective, involves people who enjoy this form of expression, and often provides ideas about common ground and new possibilities. If you run out of time, ask participants to think of something during the break and take time to share ideas after the break.

❖ **BREAK**
Time: 10 MINUTES

After the brainstorm and dots exercise and the symbol exercise, take a break.



Case Study for Participation/Discussion Techniques

In a meeting of the education committee of the local domestic violence coalition, representatives of the police, county attorney's office and judges suggest that they launch a community education initiative on domestic violence.

The representative of the local domestic violence program explains that they (domestic violence program) already are engaged in community education and this would be duplicative. Other committee members respond that there never can be too much community education.

The domestic violence program representative then suggests that training be conducted for those who will be doing community education. The others reply that they don't need any training.

The domestic violence program representative responds that she can't put her stamp of approval on the education program because she doesn't trust what people will say about domestic violence unless they are trained.

The education committee decides to launch the education initiative.

What meeting facilitation techniques could have made this a more productive discussion?



Techniques To Promote Productive Discussion

Discussion questions

- ??? *What is our vision for (e.g., services, for this coalition, for this initiative)?*
- ??? *What are criteria for a good decision?*
- ??? *What are options for?*

Brainstorming and “Dots” Exercise

For agenda items requiring an initial list of ideas, options, recommendations.

Use Right Brain Activity To Tap Creativity

During the meeting, create some activity that engages participants’ “right brain” in order to tap creativity. For example, ask participants to select a symbol of your goal (e.g., an animal, image, or object). Or give participants materials to create something to symbolize a positive outcome or your problem solved.

Participation Techniques

- No one speaks a second time until everyone has a chance to speak once.
- In meetings of fewer than 15 participants, go around the table and ask each person to suggest one idea (or pass if they choose to) or to state an opinion on a subject under discussion.
- Work in small groups for a short period of time – give groups a specific task.
- Use a round robin report back – one idea from each group until all ideas are presented.

To Debate Options and Build Consensus

- One-minute promotion – one option at a time (all who want to promote the option get 1 minute each to promote it; then move to the next option).
- Alternate pro and con 1-minute statements for each option – one option at a time.
- If most are in agreement and a few disagree, ask those who disagree to suggest another option.
- If one or two participants continue to disagree, ask, “Can you go along with the consensus? I’m not asking you to change your position. I’m asking if you are willing to go along with the consensus?”
- Vote by super majority, if it becomes necessary to vote (for groups that do not have consensus decision making).



Case Study for Brainstorm & Dots Exercise

Tomorrow is the next meeting of the education committee described in Handout #5-5. The agenda is to plan the education initiative. You (the local domestic violence program) are strategizing about what to do in the meeting.

Select an animal, image, or object that symbolizes a successful resolution of the situation with the education committee. (Example of right brain creativity exercise.)



Instructions for Brainstorm and Dots Exercise

This exercise is useful when you want to:

- Encourage participation by everyone and better understand everyone's opinions about ideas or actions being discussed,
- Test one or more ideas to see if others will select your ideas as priorities,
- Find out what ideas or actions have the greatest support in the group,
- Build consensus, or
- Generate an initial list of ideas that will then be referred to a subcommittee for more discussion and to define options for consideration by the whole group

The group brainstorm is limited to 15-20 minutes. All ideas are recorded on flip chart paper and there is no discussion of any idea during the brainstorming. (REMEMBER, there is NO discussion of any idea during the brainstorming.)

Following the brainstorm exercise, give each participant 5 "dots" (stationery stores carry these colored "dot labels."). Participants select their top 5 priorities on the list of items generated in the group brainstorm. (Put one dot next to each of the 5 priorities selected.)

If there are fewer than 15 items on the brainstorm list, use 3 dots instead of 5. Then select the 3 top priorities. Yes, there will be duplicates or similar items on the list. Proceed with the "voting" first. Combine ideas later.

After the "dots" exercise, ask for proposals to combine items. The "rule of combining": items are combined only if everyone agrees. This rule avoids arguing and discussion during this sorting process. Do not discuss proposals. This is meant to be a fast exercise to determine if there is immediate consensus to combine any items. It's also a great reminder about respecting differences of opinion.

When the combining exercise is completed, usually 3-5 priorities emerge. You then can refine the priorities and, if there is time, develop a work plan or refer them to committee for further work and move on to the next agenda item.

This brainstorm and dots exercise is an excerpt from *Day's Tools for Groups*,
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NOTES

❖ **HOW TO PRE-PLAN A MEETING TO MAKE
FACILITATION EASIER, AND
TECHNIQUES TO MOVE A MEETING FORWARD**
Time: 65 MINUTES

Divide participants into small groups of 6-8, with each group comprised of both more and less experienced meeting planners. Ask participants to turn to Handout #5-9 (Exercise on Planning a Meeting). Each small group is now a planning group for the next education committee meeting. Explain that each small group will now plan the agenda for the next meeting and select facilitation techniques.

Now ask participants to turn to Handout #5-10. Explain that you will move step by step through the meeting planning process. During each activity, walk around the room, offering assistance as needed.

First, ask each small group to define the outcome it wants to achieve by the end of the meeting. Allow 3-5 minutes for small groups to discuss this and then ask for ideas from groups. Then ask each group to put agenda items into the categories listed in Handout #5-10. Allow 5-10 minutes for this activity. Then ask small groups to decide what items they want to cover in the meeting and create a timed agenda. Use a couple of examples and then give participants 10 minutes to complete this.

In the whole group ask for examples (and provide them as needed) for meeting roles, information people need in advance, meeting logistics, and next steps. (5 minutes)

Now give participants 10 minutes to decide facilitation techniques and to write their agenda on flip chart paper. Each group will have 2-3 minutes for its presentation. Remind them that there will be a prize for the agenda voted most likely to succeed. While groups are working on the agenda, continue to walk around the room and provide assistance as needed.



MEETING FACILITATION WORKSHOP – HANDOUT #5-9

Exercise on Planning a Meeting

You are a planning committee that has been asked to plan and facilitate the meeting of the education committee (the meeting you have just strategized about as the domestic violence program – the dots exercise).

- Use Handout #5-10 to plan the agenda. (We will walk through this together.)
- Use Handouts #5-6 and #5-8 to help you develop the facilitation techniques you will use.
- Write your agenda on flip chart paper.
- Report back: Each group will have 5 minutes to answer these questions:

?? What is your agenda for the meeting?

?? What techniques will you use? Why? (See Handouts #5-6 and #5-8.)

?? How will you move the meeting along? (See Handout #5-11)

There will be a prize for the agenda voted most likely to succeed.



Planning a Meeting

Define the desired outcome of the meeting – keep this in focus as you plan the agenda. If, right now, you were at the end of the meeting you are planning, what would have made the meeting a productive use of people's time and energy?

- List all agenda items in these categories:
 - ✓ Information items:
 - ✓ Brainstorm items (brainstorm only and refer to committee/individual for more work):
 - ✓ Discussion items (refer to committee/individual for more work):
 - ✓ Decision items:
 - ✓ Next steps:
- Decide what items must be covered. Create a time allocation for each item to ensure that you have time for all items. Develop a written agenda with the items and time allocations.
- Define meeting roles and who will fill them.
- Decide what information people need in advance to make this a productive meeting.
- Define meeting logistics and who will handle them (e.g., place/equipment, refreshments, and meeting notice & agenda/materials to participants).
- Next steps: Define tasks you know in advance will need to be assigned. (Add others at the meeting as you proceed, and summarize at the end of the meeting.)



NOTES 

Agenda Presentations (10 of the 65 minutes)

Each group presents a proposed agenda. Vote for the agenda most likely to succeed. This will be the agenda used for the simulation in the afternoon workshop (for workshops that include Modules 5&6).

Techniques to move the meeting forward (15 of the 65 minutes)

Ask participants to turn to Handout #5-11. Review techniques to move a meeting forward. Ask participants to suggest “what if” situations and show how these techniques can be used to move meetings forward.

❖ EVALUATION AND CLOSING

Time: 15 MINUTES

(Be sure that you have addressed all of the red-bracketed items in the list of characteristics of effective meetings and meeting facilitation – the list which resulted from the initial group brainstorm.)

Ask participants to complete evaluation forms and to select one idea from the workshop that was especially meaningful and one idea that they are going to use right away. Explain that after evaluations are completed, the closing will be a go around with each person sharing these two ideas.

Closing exercise –

Ask for a volunteer to go first and then go around the room.

When everyone has shared ideas, add your own, and thank everyone for coming.

If you are conducting a second module in the afternoon, use the same go around and then close with information about lunch and the starting time for the afternoon session.



Techniques To Move a Meeting Forward

- Written, timed agenda – keep referring to it and proposing to move along as the time limit nears.
- Introduce agenda items by defining the desired outcomes (e.g. provide information, brainstorm ideas and refer to committee, discuss committee work/send back to committee, make a decision.)
- Send to committee/small group for further development.
- If the group gets stuck on one item, proceed to the next item and come back to the stuck place later in the meeting. Make sure you return to the item later.
- Pay attention to the group's energy - you will see when the group is ready to move ahead.
- Respond firmly to any disruptions. Avoid blaming or personal attacks.
- If someone persists in disrupting the meeting, ask the group to decide - to move on or deal with the issue being raised.



Evaluation Form Meeting Facilitation Workshop

1. What was the most useful part of the workshop for your work?

2. Please rate the following using a scale of 0-5 (5 = very helpful and useful)

Presentations _____

Relevance/usefulness of case studies _____

Handouts _____

Role plays, if used _____

Other comments/ratings:

3. Please rate trainer's teaching/coaching on a scale of 0-5 (5 = excellent)

Rating: _____

Comments:

4. How can the workshop be improved?

5. What is one idea you will begin using immediately?

6. Other comments. (Please use the other side of the page for additional comments.)

Thanks!



