



PROJECT **PERFECT**
Pty Ltd

Facilitation User Guide

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Document Origin

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Change History

Version	Date	Changes
1.0	1 Feb 09	Initial Version

Facilitation

Purpose	<p>The purpose of facilitation in a meeting is to have one person focus on achieving the purpose of the meeting. Facilitation can play a critical part in getting groups of people to contribute to the resolution of problems. A facilitator is responsible for ensuring the group works in a cohesive manner to reach a workable solution as quickly as possible.</p>
Independence	<p>The facilitator is independent. As such the facilitator should not be a subject matter expert who is critical to the outcome. There are two reasons for this.</p> <p>As a facilitator and subject matter expert they can dominate the discussion and drive the meeting to their own solution.</p> <p>They will not have enough “brain space” to think about their contribution to the subject matter, and how to keep the meeting progressing towards a conclusion.</p>
Meeting Preparation	<p>The facilitator must ensure that the necessary preparation is undertaken. The preparation includes ensuring a suitable venue is made available. It should not be too big, or too small, and should be comfortable. Materials such as a whiteboard, projector and paper should be available.</p>
Invitees	<p>The correct people need to be invited. Firstly are all the people who should attend, invited. Secondly, are all the people there for a reason? Having people to make up the numbers is a waste of time and money.</p>
Likely behavior	<p>After discussion with key participants, the facilitator should work through scenarios that may arise, and develop contingency plans. For example, is someone going to talk over everyone else? Is there a hidden agenda? Are there personality conflicts in the group? Does some preparatory work need to be undertaken? Does the facilitator need to discuss behaviour with individuals?</p>
The Agenda	<p>The meeting needs to have a clearly defined purpose, and expected outcome. For example is the meeting to discuss and resolve three topics, or is it to brainstorm ideas that will be discussed at a subsequent meeting. An agenda should be prepared in advance.</p>

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Facilitation, Continued

The Rules The rules of the meeting need to be set up. For example, is the meeting to start on time if everyone is not there? How long should topics be discussed before they are taken out of the meeting? Who is taking minutes? If there is an impasse, how will it be resolved (By vote? By escalation?)

Introduction The facilitator should start the meeting by stating the purpose, the process, and the expected outcome. They should cover the timeframe and the key issues to be addressed

Briefing The facilitator should ensure as far as possible, everyone is starting with a common level of understanding. Just because a document was circulated in advance, does not mean it has been read. The meeting should start by bringing everyone up to speed. The facilitator should also ensure there is no dissention about the background, or that important information has not been shared. This may require a briefing from someone at the start of the meeting.

Participation It is important the facilitator is maintaining equality in the input. Nobody should be allowed to dominate the meeting. Equally, nobody should be sitting quietly in a corner. The facilitator should be ensuring everyone has a chance to contribute.

The order in which contributions are made can also influence the meeting so the facilitator should be cognisant of the pecking order and ensure 'follow the leader' is not the name of the game. Try to have the opinion leaders hold their views until others have been encouraged to take a stand.

Documentation Unless it is a small meeting, it is unlikely the facilitator will have time to take notes. The documentation should be assigned at the start of the meeting if not prior to the meeting. It is useful to split the work (e.g. One person notes decisions, another outstanding issues, another risks)

Keep on Track The facilitator is responsible for keeping the meeting focused on the task at hand. Probably the most time wasting part of meetings is that they loose their way. The more intense the debate, the less focused people are on where the meeting is going as opposed to where it should be going.

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Facilitation, Continued

Crystallise

It is often useful, if someone is struggling to communicate a point, for the facilitator to crystallise what is being said.

“If I understand what you are saying, we need to go from A to B via C. Is that right?” This will focus the person talking, as well as the meeting.

Toolbox

There are dozens of techniques that can be used in a meeting such as herringbone diagrams, stating the case for the opposition, break out groups, top n reasons etc. The facilitator needs to be familiar with many of these techniques and be able to use them on short notice if they are appropriate to the way the meeting is evolving.

Resolve conflict

When conflict arises, the facilitator can keep the views away from direct confrontation. They can elicit opinions from conflicting points of view in a rational manner and work through a resolution.

Challenge solutions

The facilitator should test the views by posing a contrary view. If nobody disagrees, it may be because nobody is thinking it through, or is grasping the obvious solution. If the facilitator plays devil’s advocate, it can often lead to a better result.

Keep to Time

The facilitator should have a timetable for the meeting and push people to meet the timetable. If necessary, the meeting schedule may have to be renegotiated mid-meeting.

Raising contentious Issues

Sometimes, issues that are controversial are buried. As the independent voice, the facilitator needs to drag out the issues nobody wants to talk about. For example, a particular action might be agreed, but who is going to put forward a budget submission for the money is not discussed.

Summarizing

The facilitator needs to be able to collect the outcome as it evolves and feed it back to the group at the end of the meeting. They need to state the decisions reached, and actions to follow. Ideally, as the independent party, they should prepare the minutes. They also need to confirm with the participants what actions are to be taken, who is responsible, and due dates for the actions to be completed.
