

Facilitation from the Side

New2EA Working Group - 6/5/2019

Facilitating from the Side

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How often are you in unfocused, orderless, rambling meetings?

1

Never
All our meetings
are awesome

2

3

It's 50:50

Some good
Some bad

4

5

OMG
A meeting on
my calendar is
my worst fear.

You are not alone.
n or n-1

Facilitator's Guide to Participatory Decision-Making

Concepts, quotes, and illustrations throughout this deck are drawn from Sam Kaner's *Facilitator's Guide to Participatory Decision-Making* (2nd edition).

Materials from this book are freely distributable for non-profit use. You can obtain the book at:

- > [Google Books](#)
- > [PDF of full text](#)
- > [Amazon](#)

JOSSEY-BASS

Facilitator's Guide to Participatory Decision-Making Second Edition

Sam Kaner
with
Lenny Lind, Catherine Toldi,
Sarah Fisk, and Duane Berger

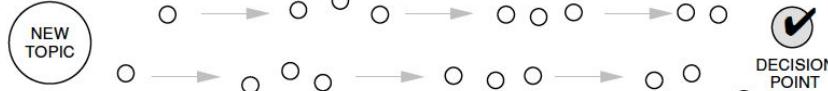
Foreword by Michael Doyle



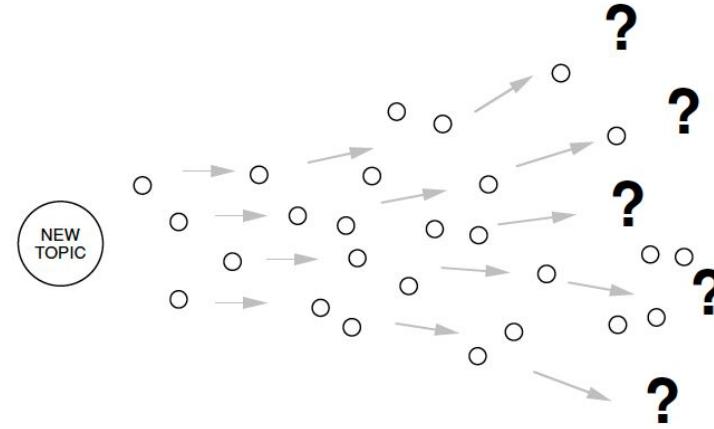
John Wiley & Sons, Inc.

Meetings on complex topics struggle to reach decisions

We'd all like our meetings to feel like ...



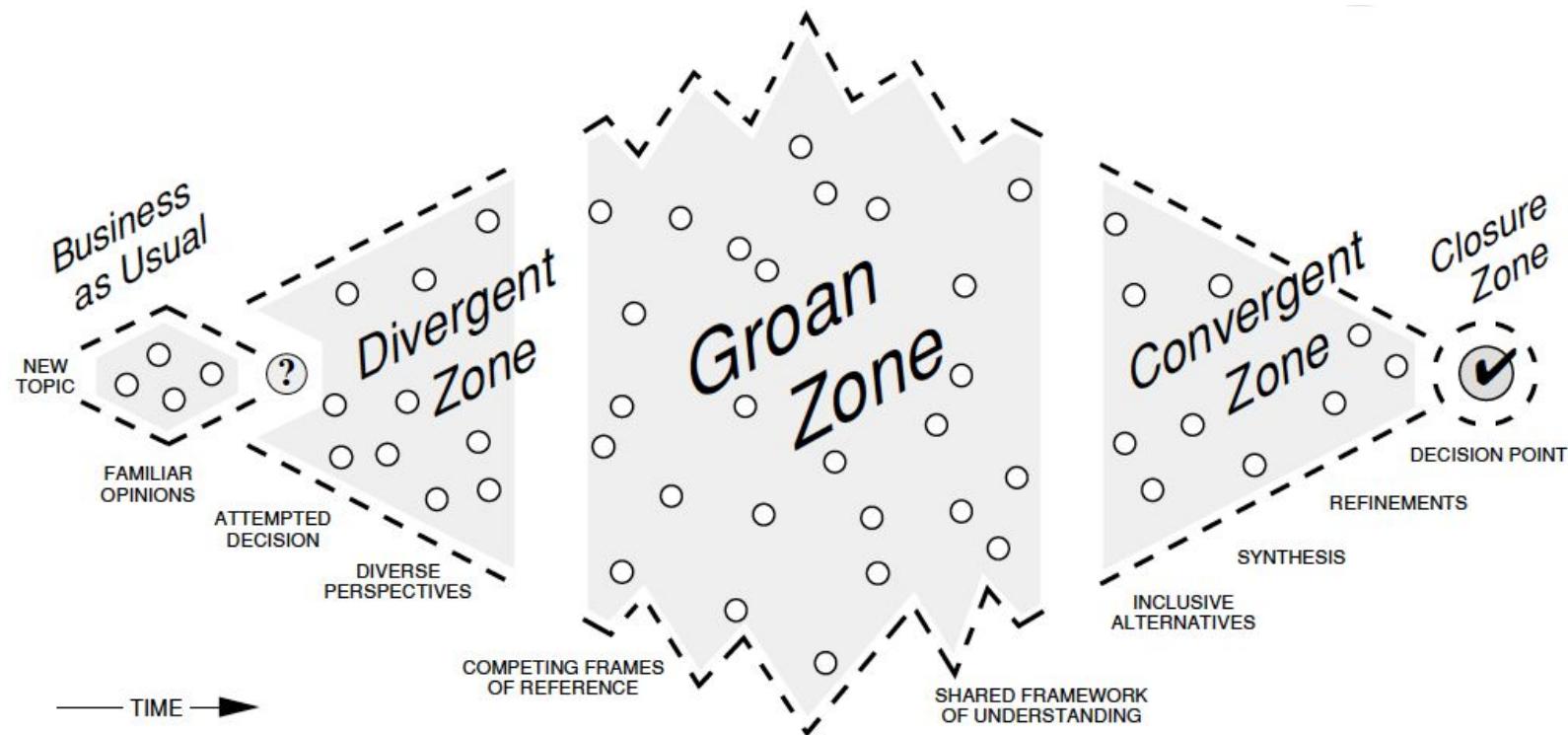
But in reality they often feel like ...



Each circle – \circ – represents one idea. Each line of circles-and-arrows represents one person's line of thought as it develops during the discussion.

Image source: Sam Kaner, *Facilitator's Guide to Participatory Decision-Making* (2nd edition).

How sustainable agreements come about



When I Facilitate from the Side...

1

I ask 'clarifying questions'. Prefaced with humility: I'm just a bit confused... or I'm sorry maybe I missed this in the email...



Could you help me understand what the goal of this meeting is?

So, at the end of the meeting, you would like to have a _____?

And that means, you would like us to _____ to help you _____?

When I Facilitate from the Side...

2

I ask if I can write them down?



Would you mind if I put them on the whiteboard or you can if you don't mind?

Often, this is an opening to go to the whiteboard.

When I Facilitate from the Side...

3

Offer Activities



“I thought it would be just be good to get together and talk”.

Follow-up: “Just so I know, what is in scope and out scope for the discussion?”

Then offer activities:

- > Should we do an agenda bash to get ideas on the whiteboard?
We could then rank them so we cover the hot topics first.
- > Should we do a sticky note exercise to see what is top of mind of folks? We could group the stickies to find common themes.
- > Should we do a go-around to see what everyone’s biggest concern or challenge is?

“I thought we would review this document [that wasn’t sent out]”.

Then offer activities:

- > Should we break into small groups to read and comment then come back together?
 - So who [else] had comments in the first section?
- > Do you want us all to take 15 minutes to read the document now and then comment? If so, how should we gather comments?
- > Do you want to give us an idea about the types of feedback you are looking for and when you need it?
- > Can we comment on the document live in Word/Google?

When I Facilitate from the Side...

4

Offer to help “capture notes”

Would you like me to capture this concepts / conversation?

The person who controls the markers, controls the meeting.



Often, this is an opening to go to the whiteboard.

When I Facilitate from the Side...

5

Reflect back the goals and outcomes when the conversation gets sidetracked.



Remember, the goal of this meeting is to _____. That is interesting but maybe we can put it in a parking lot for later.

Would you like me to start a parking lot? (Heads towards the whiteboard).

When I Facilitate from the Side...

6

Provide a time check



We only have 30 minutes left and I want to make sure we get to where you want to get?

There are 10 minutes left, should we start to wrap up -or- in case anyone needs to leave early?

I see there are 5 minutes left, should we capture next steps?

By Asking Questions and Offering to “Capture Notes”

- > Set the goals for the meeting
- > Defined the roles of the participants
- > Defined the meeting outcomes
- > Scoped the conversation
- > Defined the process by which we will get there (activities)
- > Captured the notes
- > Parked out-of-scope conversations*
- > Provided time checks
- > Pushed towards next steps

Things to think about before you do this:

Political Lens:

Whose meeting is it?

Who is in the room?

Will someone look like fool?

Can you afford to make them look like a fool?



Things to think about before you do this:

Cultural Lens:

How does this team or group work?

Are they really tight and you are the outsider? - I'm new... help me understand...

Do they have a strong command and control culture?

Are they very top-down, hierarchical?



Things to think about before you do this:

Investment Lens:

Is it worth your political capital?

Is the meeting salvageable at all?

Is this the place you want to invest?

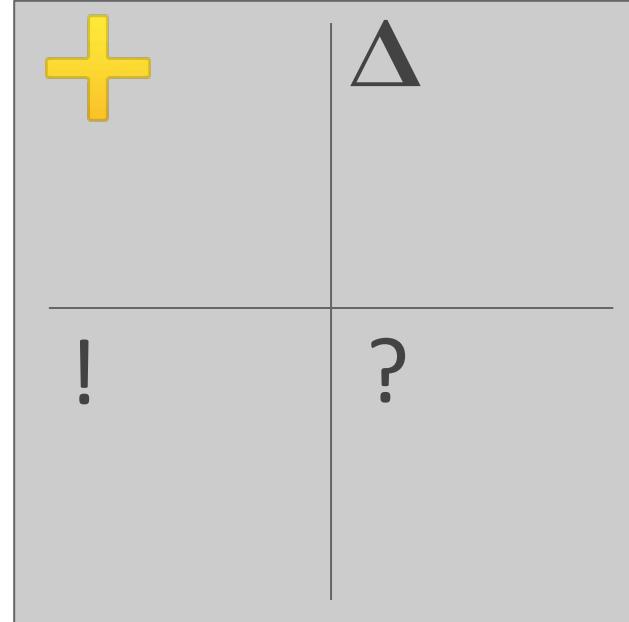
Might you get pulled into a much larger effort?



After the meeting - Can I give you feedback?

Post meeting discussion:

- Talk with the meeting owner .
- “I hope it was okay that I was asking questions and taking notes”.
- “I hoped it helped you get what you wanted”.
- Offer to help plan and run the next meeting.



Questions and Feedback

| | |
|---|--|
|  |  |
| <i>Things you liked</i> | <i>Things you would like changed, you didn't like</i> |
| ! | ? |
| <i>Big Ideas you will take back to your own practice</i> | <i>Things you want to learn more about</i> |

Closing

+ Δ ? ! Once more around, any final thoughts, reflections, questions or things we may have missed or went unsaid?
(you are free to pass)

NEXT New2EA WG CALL: June 19, 2019

Call Time:

11AM Pacific, Noon Mountain, 1PM Central,
2PM Eastern Time

Agenda:

[New2EA WG \(Wiki\)](#)

New2EA Steering Group: June 12th, 2019

Call Time:

11AM Pacific, Noon Mountain, 1PM Central,
2PM Eastern Time

Agenda:

Planning upcoming New2EA WG Sessions