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Diocesan Director Toolkit

GUIDELINES FOR FACILITATING MEETINGS

LEARN ABOUT THE PARTICIPANTS

- How well do the participants know each other?
- What type of relationship do they share?
- What type of experiences have they shared in terms of achieving results?

PREPARE

- Consult with participants to assess their needs
- Help participants clarify purpose and outcomes
- Design a process that helps members participate in decisions and manage their time efficiently
- Visualize the process and dialogue so participants can reflect on what they understand and what their differences are
- Select tools that enable participants to achieve their desired outcomes

DECIDING TO BE A FACILITATOR

- Do I have an agreement to make this type of event from key stakeholders?
- Will the participants have the time they need to process the intervention?
- Does the group have sufficient capacity to use the process?
- Does the group have enough information and experience to participate?
- Do I have the skills required to be a facilitator?

WHAT ARE CRITICAL BEHAVIORS AND ACTIONS FOR AN EFFECTIVE FACILITATOR

Diocesan staff often encounter the need to facilitate group events for a variety of purposes: developing a diocesan strategy, setting priorities due to cutbacks, building consensus among diverse perspectives and managing a change. When possible, it is helpful to have a person with the following experiences:

Knowledge

A good facilitator has an overall understanding of the environment in which they are facilitating a participatory event. Understanding the church structure and systems and external structures and systems that impact the community provides the understanding and sensitivity for listening, asking relevant questions and challenging the group.

Key Actions That Support Effective Facilitation

- Establishes sponsorship and ownership for change—clarifies case for change and desired outcomes, facilitates church sponsorship of expected outcomes, engages stakeholders to build a critical mass of support.
- Creates a contract for change—helps constituents contract for change, clarify outcomes and establish realistic expectations for change; identifies boundaries



for change; clarifies relationships, roles and conditions for success.

- Provides feedback—prepares stakeholders for receiving the results of the data gathering and analysis, provides feedback; involves people to raise awareness and gather input on the best course of action; helps stakeholders build a communication plan that generates buy-in and commitment; facilitates effective two-way communications to ensure understanding, commitment and behavior change.

HOW CAN I APPLY THIS GUIDANCE TO MY WORK?

Below is a table that gives an overview of how you can use your learning to facilitate a participatory event.

ASSESSMENT & DESIGN	PLANNING IS CRITICAL
Select a technique to analyze needs: Interviews, surveys, group interviews, observations	Preparation can be as important as the facilitation itself
Identify purpose and outcomes	Ensure participants understand the meeting design
Develop group process	Be prepared to advocate for certain items that need to be discussed
Identify group process tools	
Create a draft agenda	
Ask for feedback from key stakeholders for feedback	

FINAL PERPARATION	INDUSTRY PRACTIES
Write the design for the leader	For one-day workshops for 18 people, allow half of the day for needs assessment and half of the day for design
Clarify roles and responsibilities	The larger the group and the longer the event, the more time you will need
Check the location	
Help the leader prepare letter for participants detailing logistics and final agenda	
Identify all materials and supplies	
Design and write up all workshop materials	
Complete handouts and flip charts	

TO START A FACILITATION	REMEMBER
Welcome participants	Stay neutral
Have participants introduce themselves	Make eye contact
Explain your role	Include quiet people
Clarify purpose and expected outcome	Paraphrase actively
Agree on ground rules	Synthesize ideas
Explain the process	Visualize questions and response (key ideas)
Set time frame	Keep a parking lot list to flag off-topic items
Appoint timekeeper and minute taker	Refer questions back to the participants

DURING A FACILITATION	MANAGE CONFLICT
Ask, "How's this going?"	Vent feelings (listen, empathize and clarify)
Check the pace... too fast or too slow	Resolve the issue (take a problem-solving approach and end with clear action)
Check whether the techniques are working	
Clarify purpose and expected outcome	
Take the pulse of the participants	
Summarize periodically and at the end of the session	

TO END A FACILITATION	MAKING TIME FOR CLOSURE
Help participants make clear statements of what was decided	Leave enough time for participants to clarify
Develop clear next steps with dates and names	Provide a short exercise to give closure to the event
Round up leftover items	
Help create the next agenda	
Clarify follow-up process	
Evaluate the session	

FOLLOW-UP ON A FACILITATION	SAMPLE QUESTIONS
Send out a questionnaire to track progress on process	What were the major outcomes?
	What action have you completed?
	What are you still working on?
	Are there any steps that the whole group needs to take in order for you to complete your action plans?
	Are there any future discussions needed?

WHAT ARE SOME COMMON DESIGN PRACTICES?

TITLE: Parish Council

FIELD OF APPLICATION: Council Meeting

What types of exercises and games help groups to participate and achieve their goals?

Choosing exercises and games is an art. It depends on the ability of facilitator to perceive the state of the group and to predict the outcome of different choices. Selecting exercises and games entails allocating time for debriefing. A debriefing is as important as the exercise the group participates in. At the end of the exercise or game, the facilitator debriefs, that is, s/he asks the group to reflect on the experience asking: What happened? What did you feel? What did you learn and how can we apply it?

There are different types of games and exercises that create the opportunity for your group to reflect on the experience, debrief the experience and transfer the learning to their work.

ICEBREAKERS AND GETTING TO KNOW EACH OTHER

In participatory events, the main resource is the participants and the skills they bring to the workshop. Therefore, start with exercises which will allow participants to get to know each other quickly so they can exchange the wealth of experiences that each person brings.

Intercultural Communication:

As facilitators, we are often confronted with a diverse group of people from different cultures. There are exercises to develop an awareness and respect for other ways of thinking, feeling and acting, without losing our cultural history.

Team-Building and Cooperation:

A group can only become a team when all the members are interdependent. With constructive interaction, dialogue and consensus, cooperation and teamwork increases. There are exercises to encourage such dialogue and to reflect on the nature and process of teamwork.

Conflict Management:

Participatory events, by their nature, provide a means of dealing with conflict. Conflicts arise out of different perceptions, world views, intolerance and prejudices. Well-facilitated participatory events are processes which create dialogue and encourage understanding, therefore facilitating conflict management.

Case Studies and Role Plays:

Case studies and role plays are based on real-life situations. The experience asks participants to analyze and suggest different kinds of solutions and sharpen analytical and problem-solving skills.

Creativity and Problem Solving:

Creativity is the ability to look at a familiar situation, task or problem and see solutions that go beyond the conventional, the normal or the standard procedure.

Relaxation and Meditation:

Relaxation and meditation exercises are intended to help the group control the overload of information that may hinder discussion and work processes.

Evaluation:

A group event should end with the evaluation of the ideas and feelings of the participants. Different methods of evaluation may be used: a round robin, an open discussion, a card collection, a questionnaire. It depends on the size of the group and the time available.

Event Closure:

End games are meant to be used at the very end of the workshop. The objective of the game is to say good-bye or to bring the group event to a successful closure.

SOURCES

1. Organization and Development Institute and Network
2. Books
 - *The Skilled Facilitator* by Roger M. Schwarz
 - *Facilitating with Ease* by Ingrid Bens
 - *Games and Exercise: Visualization in Participatory Programs*, UNICEF