Facilitation

Trainer Names:

Learning Objectives:
Skills, Knowledge, and Attitude which learners should take away from this session.
- Understand the importance of facilitation for effective groups and campaigns
- Know the basics of how to facilitate

Achievement Objectives:
Tangible steps learners will take to advance real or simulated campaign work.
- Learn and utilize effective facilitation techniques
- Assess the effectiveness of facilitation within SIM teams thus far

Link to Written Content:

Time: 60 minutes

> **Anchor:** The ANCHOR step invites learners to reflect on past experiences which relate to the learning of the session. (e.g. "Think back to a time when ____. What did that feel like?")

1. Role Play: Bad Facilitation [10 min]
Do not make it clear that this is a role-play. Set up the room so that people can't see each other well, with everyone oriented towards the two trainers, like in a traditional classroom.

You and your co-trainer should begin by pretending to start a training from later in the program's agenda. In the role play, you should model bad facilitation techniques, such as:
- *trainers are disorganized, don't really know what we're doing*
- *ask yes/no questions, generally seem disinterested*
- *low energy in the room*
- *not paying very good attention to each other, cutting each other off*
- *have one planted trainer start to disturb the group*

Once participants are clearly losing interest, end the role play by saying: "FREEZE! Okay, what's going wrong here?". Ask for someone to take notes on the flipchart on <u>what went wrong in the previous scenario.</u>

Look for answers like room orientation, tone, volume, focus, generating group dialogue rather than just person-person, this didn't make us feel good, this didn't make us feel included.

Facilitation should empower people and groups to realize their full potential. Facilitation involves reading the dynamics and energy of the group, feeling for trends, and changing the way you're presenting information in reaction to group vibes.

Finish the roleplay by changing up the space and raising energy for the rest of the training.

1. Mini lecture: What is facilitation and why is it important? [5 min]

What is facilitation? It is a process to make meetings run smoothly and be more effective, participatory and democratic. It can be used to guide meetings, discussions, and decision-making.

Ask the group: why is facilitation important? <u>Flipchart responses.</u>

Why is facilitation important?
- ■ Helps you have effective meetings
- ■ Makes your group inclusive/participatory
- ■ Retains members
- ■ Helps gather many different ideas and perspectives
- ■ Can resolve conflicts between members

2. Brainstorm: Steps of Facilitation [10 min]

Begin this section by introducing the three steps of facilitation. For the first two steps, trainers will then lead the group in a brainstorm of effective tips and techniques to accomplish each step. It's important during this segment to create space for everyone to share, not only those participants that have had the most extensive facilitation experience.

There are three basic steps that you can do in order to ensure productive facilitation:

Basic Steps of Facilitation
1. Choose people for roles
2. Review ground rules and agenda
3. Moderate conversation

1. Choosing people for roles

What roles do you think are absolutely necessary in a meeting? Why are these roles so important?

Some suggested roles include:
1. ***<u>Facilitator.</u>*** *Ideas: Calls on people to speak, makes sure everyone is heard*
2. ***<u>Time-keeper</u>****. Ideas: Keeps group on time, helps to avoid tangents*
3. ***<u>Note-taker</u>****. Ideas: missing members aren't left in the dark*
4. ***<u>Vibes watcher</u>****. Ideas: watches energy level, tension, calls breaks if necessary*

2. Review ground rules and agenda

Once you feel that the group has had sufficient conversation around important roles they have used in the past, transition to talking about ground rules and agenda. What ground rules do you think are absolutely necessary in a meeting? Why is having an agenda important?

Some suggested responses about ground rules include:
- ● Help reduce conflict by deciding on a decision-making process
- ● Increase participation in the discussion

- Specific ground rules can specifically address inclusivity in a space (e.g. asking PGPs)

Some suggested responses about an agenda include:
- Stay on track and have a clear focus
- Makes the most out of full-group meetings
- Allotting certain amounts of time, and forcing conversations to move forward

2. The Essence of Facilitating: Moderating Conversation [10 min]

The largest chunk of this time should be left for explaining how to moderate conversation. In this section, trainers should introduce each facet of moderating conversation individually and provide an example of how to facilitate using each technique, i.e. "One way that I like to moderate conversation with questions as a facilitator is to ask a question and then do a group go-around. This way, everyone gets to answer the question." After trainers share their own experience, they should ask participants to brainstorm other ways to utilize these ways of moderating conversation.

What do we mean when we say "moderate conversation"? Moderating the conversation is a strategy to make sure that everyone's voice is heard. The facilitator remains a neutral party and seeks to push forward conversations. In this way, they are like a debate moderator.

There are three different ways in which a facilitator can moderate a conversation: by asking questions, delivering feedback, and honoring agreements.

1. Moderate conversation with questions
- Open ended questions
- Clarifying and probing questions
- Throwing questions back out to the group

Once you have shared tips from your own experience, ask participants to share theirs.

2. Moderate conversation with feedback
- Acknowledging great answers and contributions
- Asking individuals to share more, or share less depending on past contributions
- Active listening and rephrasing
  - "So, what I'm hearing is…"

Once you have shared tips from your own experience, ask participants to share theirs.

3. Moderate conversation with honoring agreements
- Call out when group agreements are broken within a space
- Ask the facilitator to hold stack in a certain way, i.e. prioritizing voices of people of color
- Follow the agenda that the group set beforehand and hold members to it
- Be receptive to feedback about your own facilitation

Once you have shared tips from your own experience, ask participants to share theirs.

1. Small Group Facilitation Activity [20 min]

In this section, participants will participate in a small-group activity in order to practice facilitation. Participants are divided into groups of four and each group is given four note cards. Each note card has a different conversation topic related to environmental or social justice. Ask for one volunteer in each group to facilitate first. The first volunteer facilitator should then pick one of the four note cards and inform the group of the topic on it. This facilitator will then lead a conversation on the topic for about four minutes, utilizing the three tips for moderating conversation. After four minutes, the trainers will announce a pause and the facilitator's group will then provide feedback on their facilitation for one minute. This is the end of the first round of this activity.

Each subsequent round of this activity repeats these steps with a different facilitator picking a different note card. Run the activity for four rounds so that each participant gets a chance to facilitate.

Suggested topics for the note cards include:
- *A local environmental issue (e.g. solutions to the California drought)*
- *A campaign strategy proposal (e.g. strategies for divestment from private prisons)*
- *A response to current events (e.g. how should our group respond to discriminatory voting legislation that was just passed in our state?)*

1. Debrief Program Facilitation [5 min]

For programs with SIM:

Since facilitation is a skill that participants have been unknowingly using throughout the week, this is the time for them to get together with their SIM teams to debrief facilitation thus far. Believe it or not, you all have had a lot of experience this week with facilitation already, even before this training. Your work with your SIM team in particular has required you to set roles, ground rules, agreements, and agendas. You have also had to have discussions on difficult topics. To close out this training, your SIM team will have time to reflect on how to improve team facilitation going forward. *Suggest that each group makes a list of things that have gone well so far ("pluses") and aspects of team facilitation that they aim to change or improve ("deltas"). Ask teams to dig into questions like:*

- *Do we take turns facilitating our conversations or is one person usually facilitating?*
- *Have we set agendas to use time effectively?*
- *Have our ground rules ensured that everyone has an equal chance to participate?*

Finish by having each group share out one plus and one delta with the entire group.

For programs without SIM:

Since facilitation is a skill that trainers have been using throughout the week, this is the time for

participants to debrief facilitation thus far. You've probably realized that your program trainers have been utilizing their facilitation skills throughout the week. To close out this training, we want you to get into groups to reflect on some facilitation techniques you have seen your trainers model so far, or any facilitation techniques that you think they could improve. Think about what facilitation techniques you have seen that you would like to take back to your own school or community. *Suggest that each group makes a list of things that have gone well so far ("pluses") and aspects of team facilitation that they wish to change ("deltas"). Ask teams to dig into questions like:*

- *When have trainers facilitated our conversations most effectively? How have they made space for a diversity of people to share their ideas? How could they do better?*
- *Has the program set agendas to use time effectively?*
- *Have our ground rules ensured that everyone has an equal chance to participate?*

Finish by having each group share out one plus and one delta with the entire group.