Engaging in Effective Meeting Facilitation

- Erin Gordon, Associate, Lizard Brain Solutions
Engaging in Effective Meeting Facilitation

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#FORUMCON19
Why are you here?

Grow and refine your facilitation toolkit!

*Walk way able to…*

- Define the role of a facilitator and articulate facilitator competencies
- Employ a flexible framework for designing meaningful conversations
- Apply quick tips and tricks for maintaining participant engagement
Hello!

Facilitator
Coach
Creative strategist
Visual practitioner
Artist

BUSINESS

ART
Agenda Overview

Now! Welcome and Overview

1:50 Facilitation as a Discipline

2:05 FORCE Framework

2:15 Opening

2:30 Refining

2:45 Closing

3:05 Reflection & Close
1. What skills are unique to facilitation?
2. What skills does a facilitator share?
3. What skills does a facilitator not share?
What is a Facilitator?

1. What skills are unique to facilitation?
2. What skills does a facilitator share?
3. What skills does a facilitator not share?
When to Facilitate?

Do… When / seeking
- Co-creating
- Full participation
- Respectful, supportive environments
- Diverse perspectives

When working on / towards…
- Complex challenges
- Many unknowns
- Consensus
- Commitment

Don’t… When
- Telling
- Selling
- Advising

When working with / towards…
- Routine / pre-defined solutions
- Exerting power / influence
- Undefined boundaries
Find your Framework!
**OPENING**

Methods for bringing in new ideas

**Brainstorming**

*by Alex Osborn*

1. No judgment or criticism
2. Be free-wheeling: the more wild the better
3. Go for quantity: the more ideas the better
4. Build on the ideas of others

Susan Cain's challenges to brainstorming:
- Social loafing
- Production blocking
- Evaluation apprehension

**Shotgun Stickies**

1. Group agrees to a problem or question to solve
2. Group agrees to a time box (e.g., 5 minutes)
3. Participants write options on sticky notes
4. Facilitator gathers sticky notes
5. At the end of time, facilitator reads each sticky and places them in view of the group
   May repeat exercise to build on others' ideas

**Brain Writing**

1. First person writes a problem or issue
2. Note passes to next person, who writes a possible solution
3. Repeat step 2 until note returns to first person

**Other OPENING Methods**

- 1-3-4-All by Liberating Structures
- 25/10 Crowd Sourcing by Liberating Structures
- Marketplace of Ideas by Harrison-Owen
- Team Portrait by the Grove Consultants
- Round Robin by LUMA Institute
- World Café by Juanita Brown and David Isaacs
- Mindmapping by Tony Buzan
- 90-Second Serial Share by Joe Gerstandt

**REFINING**

Methods that apply criteria to decide between ideas

**Straw Poll**

"I'd like to suggest a non-binding straw poll to see where we stand with this issue. If we're all in agreement, then we'll consider the decision made and move on. If an option doesn't get a vote, we won't discuss it further. If there isn't consensus, we'll continue the discussion around the options that received votes. It sounds like there are four options on the table. Those in favor of option 1..."

**Affinity Clusters**

Group similar ideas on stickies together spatially. Ask the group, "Where does this idea belong? What's similar to it?" Some ideas may have subordinate relations. Eliminate any identical twins (e.g., eyeglasses and spectacles.) Watch non-verbal communication closely for silent disagreement. "Bob, you're shaking your head. What do you think?"

**Dot Voting: n/3** pronouned "en over three"

Participants receive a number of dot stickers equal to the number of options divided by 3. (e.g., for 12 options, participants receive 4 dots.) Participants place their dots on the options they prefer.

**Variation 1 - Forced Spread:** Participants MAY NOT place more than one dot on any one option. This distributes results evenly and opens participants to accepting other options.

**Variation 2 - Weighted:** Participants MAY place more than one dot on any one option according to their preference. (e.g., 2 dots on an option, 3 on another.) This eliminates options participants are lukewarm about and reveals strong preferences.

**Other REFINING Methods**

- 5-Finger Vote from Agile Development
- Importance/Difficulty Matrix by LUMA Institute

**CLOSING**

Methods for planning and executing ideas

**Action List**

A good action list features:

- A clear action
- Who the action is assigned to
- The first task in the action
- When the task will be completed

A good action list may also feature:

- A target date for the overall action's completion
- "SMART" actions: Specific, Measurable, Achievable, Relevant, Time-bound

**Team Calendar**

A team calendar for training purposes, prepopulated with known "hard dates" (e.g., training, vacation, meetings, conferences, other time commitments.) Tasks are sequenced and added to the team calendar.

**Kanban Board**

A task-tracking tool from lean and just-in-time manufacturing. Each task is written on a sticky note. Tasks are initially placed in the To Do column. When work begins on a task, the sticky moves to the In Progress column. Completed tasks move to the Done column. A best practice for kanban boards prioritizes tasks in the To Do column against specific criteria.

**Other CLOSING Methods**

- Five Bold Steps by the Grove Consultants
- Graphic Gameplan by the Grove Consultants
- Graphic Roadmap by the Grove Consultants
- Business Model Canvas by Alex Osterwalder
- RACI Matrix by Project Management Institute
- Storyboarding by LUMA Institute
- Concept Posters by LUMA Institute
- Cover Story by the Grove and LUMA Institute
4 ESSENTIAL RULES
1. Go for quantity
2. Suspend judgement
3. Welcome wild and wonderful
4. Build on the ideas of others

BONUS
Be visual
Stay focused
One conversation at a time

Avoid the Pitfalls
Social Loafing with tools that invite participants to share in sequence
Production Blocking breakout from the large group; harvest in tweets and sticky notes
Evaluation Apprehension
Leverage rules, principles to build and sustain spaces of safety and respect; harvest anonymously

Quiet, Susan Cain
1 – 2 – 4 – All

1. As a group, frame the challenge as a question. **3 min**
2. Individually, and in silent self-reflection, develop ideas to address the challenge (one idea per sticky note). **1 min**
3. Generate ideas in pairs, building on individual ideas. **2 min**
4. Share and develop ideas from your pair in foursomes (notice similarities and differences). **4 min**
5. Ask, “What is one idea that stood out in your conversation?” Each group shares one important idea with all (repeat cycle as needed). **5 min**
Setup

You and the individuals seated around you have been selected to form an experimental concept in innovation. You were each chosen based on impressive track records in your PSO work. You have demonstrated yourselves to be fully capable leaders able to succeed despite adversity and ambiguity. You have three traits in common: you deliver results that increase philanthropy impact, you work through process, and you foster a learning mindset.

Challenge

Your team has been granted $1,000,000 in seed money to launch a new core area of work for the Forum. You can choose to acquire or develop any core area, as long as it:

- Aligns with the vision, mission and values,
- Will have a clear, measurable impact, and
- Can demonstrate tangible progress within 30 days.

All other constraints (policy, organizational boundaries, doctrine, technology, oversight, security, etc) have been either lifted or guarded against. Legal and physical constraints are still in place: your core work area must comply with law, nature and currently commercially available technology. And if your efforts are unsuccessful, there is no negative impact on you, your position or the organization.

After thirty days, your team will provide an overview of the new core area of work. The overview must demonstrate reasonable viability to be successful, and if so your team will receive additional funding of $1,000,000 to continue.

Task

Your team must develop and decide on an idea for a new core area of work for the Forum. Once completed, your idea will be submitted for review and evaluated against the criteria above (alignment, impact and progress). Your idea will also be evaluated on the degree in which it demonstrates creative and innovative thinking. Your idea will NOT be judged against factors of neatness or polish. If your idea passes the above criteria, you will receive the $1,000,000 in seed money and begin work.
Clustering & Impact Matrix

Cluster Relationships

- Different
- Related
- Parent-child
- Categorized

Matrix Possibilities

Eliminate duplicates
Visual Maps & Templates
Engagement

RetroSpective

what is fun?
THANK YOU!

Please remember to complete your evaluation!

#FORUMCON19
Supplement Slides

Additional information and reference materials
Facilitation as a Discipline

Core Competencies

• Create collaborative client relationships
• Plan appropriate group processes
• Create and sustain a participatory environment
• Guide group to appropriate and useful outcomes
• Build and maintain professional knowledge
• Model positive professional attitude

IAF | Promoting the Power of Facilitation Worldwide
Learn more iaf-world.org
Facilitation as a Discipline

Ethics

- Client Service: we are in service to our clients, using our group facilitation competencies to add value to their work.
- Conflict of Interest: we openly acknowledge any potential conflict of interest.
- Group Autonomy: We respect the culture, rights, and autonomy of the group.
- Processes, Methods, and Tools: We use processes, methods and tools responsibly.
- Respect, Safety, Equity, and Trust: We strive to engender an environment of respect and safety where all participants trust that they can speak freely and where individual boundaries are honored. We use our skills, knowledge, tools, and wisdom to elicit and honor the perspectives of all.
- Stewardship of Process: We practice stewardship of process and impartiality toward content.
- Confidentiality: We maintain confidentiality of information.
- Professional Development: We are responsible for continuous improvement of our facilitation skills and knowledge.

Values

- Inherent value of the individual and the collective wisdom of the group
- Help the group make the best use of the contributions of each of its members
- Suspend personal opinions and support the group’s right to make its own choices
- Collaborative and cooperative interaction builds consensus and produces meaningful outcomes
- Professional collaboration improves the profession
# Focused Conversation Method
## Four-Level Structure

<table>
<thead>
<tr>
<th>Prep</th>
<th>Topic</th>
<th>the focus or subject of the conversation</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Rational Aim</td>
<td>the intent or practical goal of the conversation.</td>
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<tr>
<td></td>
<td>Experiential Aim</td>
<td>the inner impact and overall experience intended for the conversation group.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Leading the Conversation</th>
<th>Opening</th>
<th>welcome and context</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Objective: ask for facts, information, and sensory impressions.</td>
<td>Reflective: ask for personal reactions, associations, emotions and images.</td>
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<tr>
<td></td>
<td></td>
<td>Interpretive: ask for meaning, values, significance, purpose and implications.</td>
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<td></td>
<td></td>
<td>Decisional: ask for resolve, action, future direction and next steps.</td>
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<td></td>
<td>Closing: reflection and appreciation.</td>
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</tbody>
</table>
## Focused Conversation Method
### Sample Questions Starters

<table>
<thead>
<tr>
<th>Objective (facts)</th>
<th>Reflective (feelings)</th>
<th>Interpretive (findings)</th>
<th>Decisional (future)</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is an example of…?</td>
<td>What seemed to work well, not so well?</td>
<td>What are the implications of…?</td>
<td>What actions shall we take?</td>
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<tr>
<td>What words catch your attention?</td>
<td>What does this remind you of? What do you recall?</td>
<td>What are some of the root issues…?</td>
<td>What next steps to you see here?</td>
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<tr>
<td>What have you heard about…?</td>
<td>What experiences have been “emotion”…?</td>
<td>What is the intent of…? What is the impact of…?</td>
<td>What are we naming as the highest priority?</td>
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<tr>
<td>What is going on with…?</td>
<td>What causes you to…? What surprises you about…?</td>
<td>What makes “X” effective?</td>
<td>What is our next step? Who will take it / own it</td>
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<tr>
<td></td>
<td>What intrigues you about…?</td>
<td>What is important about?</td>
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<td></td>
<td></td>
<td></td>
<td>What actions shall we take?</td>
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<td></td>
<td>What is our next step? Who will take it / own it</td>
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<td>What are the knowns or givens?</td>
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<td>What are some events that led to this state, circumstance or problem?</td>
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<td>What information is relevant?</td>
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<td>What happens when you feel supported at “place”…?</td>
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<td>What are you most passionate about?</td>
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<td>What about “X” sounds…?</td>
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<td>What rises concern for you around…?</td>
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<td>Why is this significant?</td>
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<td>What does this mean for “X”…?</td>
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<td>What values are being supported / not supported?</td>
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<td>What is the danger of succeeding?</td>
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<td>What are the opportunities, challenges, risks associated?</td>
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<td>What else needs to be said right now? Who else needs to hear what was being said in this conversation?</td>
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<td>What is the first step when we depart?</td>
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<td>How will we hold each other accountable?</td>
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</table>
Share Your Feedback

- Please take a couple of minutes and share what you thought of today’s session. We want to hear from you!
- Session surveys are available in the conference app.
- Navigate to the session and click on “Session Survey” underneath the session description & speakers.
Thank You

What’s Next?

- 3:15 - 3:45 pm, Networking Break & Bookstore, 6th Floor Foyer near Orchid Ballroom
- 3:45 - 5:15 pm, Concurrent Sessions
  - Advancing Racial Equity in Philanthropy Workshop Part 2, Vanda North and South (6th Floor)
  - REDI Consultants: How to Find Them, Engage Them and Manage the Relationship, Stanhopea (7th Floor)
  - Opportunity Zones, Impact Investing and Loan Guarantees: What is the Role for PSOs?, Caladenia (7th Floor)
  - The PSO Field Guide to Partnership and Collaboration, Calypso (6th Floor)
  - Philanthropy in the Digital Age, Cattleya (6th Floor)