Mid-Level Practitioners Workshop

- Erin Gordon, Associate, Lizard Brain Solutions
Grow and refine your facilitation toolkit!

Walk way able to…

• Frame a space that encourages inclusive dialogue and builds sharing understanding
• Design conversations using a flexible facilitation framework
• Articulate facilitation best practices and obtained methods for ongoing practice
• Employ methods to maintain participant engagement
Hello!

Facilitator
Coach
Creative strategist
Visual practitioner
Artist
Opening Activity

**THINK** 2 minutes
Individually reflect on your role (or the hats you wear) with the Forum. What interlacing skills help you wear those hats? Ask yourself where facilitation comes up midst your role, or those hats.

**WRITE** 1 minute
Write or draw out how facilitation comes up

**SHARE** 2 minutes
Pair up with someone seated beside you. Share what you wrote and how facilitation presents itself. 1 minute each.
Welcome and Overview

Facilitation as a Discipline

FORCE Framework & Framing

Break!

Opening

Refining

Closing

Engagement

Reflection & Close
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?
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What is a Facilitator?

Facilitators bring ease to groups by adopting a style of flexibility, focus on the process and understanding group dynamics. Facilitators garner commitment.

- Managers: exerts authority; orients to right decisions and plans
- Consultant: offers expertise; informs decisions; provides recommendations
- Instructor: owns content; expects understanding
- Coach: partners with future focus without decisional ownership; seeks development
1. When might you use a more facilitative leadership style?

2. When wouldn’t you?

3. What kinds of outcomes do/do not lend themselves towards a facilitative approach?
1. When might you use a more facilitative leadership style?

2. When wouldn’t you?

3. What kinds of outcomes do/do not lend themselves towards a facilitative approach?
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!
Focus on FRAMING tools

- What spaces do you need to create and sustain in your work?
- What methods do you use that work well?
- What methods could you refine based on what you’re already learning?
Break!
15 minutes
The ORC Framework
OPENING
Methods for bringing in new ideas

Brainstorming
by Alex Osborn
1. No judgment or criticism
2. Be freewheeling: 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 Cafe by Juanita Brown and David Isaacs
- Mindmapping by Tony Buzan
- 90-Second Serial Share by Joe Gerstand

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 pronounced "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
Brainstorming

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. 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
THANK YOU!

Please remember to complete your evaluation!

#FORUMCON19
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?
  - 12:00 - 12:30 pm, Break
  - 12:30 - 2:15 pm, Conference Opening Luncheon, Orchid Ballroom (6th Floor)