

**ALP Advanced Facilitation
Facilitation Plan
March 31, 2021
12:30-4:30 EDT**

Clock	Time	Slide	Segment	Notes for Delivery
12:10			Open Zoom and run check through	
12:30			SESSION BEGINS	
	:15	1	Welcome, Goals, & Agenda	
	:03		Introductions	
	:07	2	Opening Questions To start, I have a few questions for you: 1. If you do some or most of the facilitation for your program – virtually raise your hand. For those with your virtual hands raised: I’m interested to know what situations in facilitation are most challenging for you. Please use the chat feature to briefly say what those situations are for you.	
		3	2. If you use an outside facilitator – virtually raise your hand. Those with your hands raised – I’m interested in how you know you have the right facilitator. Please use the chat feature to say what indicators you use to know whether or not you have the right facilitator.	
		4	3. Poll: Do you think facilitation in current community environments is harder or easier than it has been in the past?	
	:02	5	Objectives We’ll address facilitation using a four point framework: 1. How to assess in advance of a facilitation. How to step back and assess, what’s going on here and what’s needed here? 2. Frameworks to help you prepare for facilitation. 3. Processes & tools a you deliver a facilitation. We’ll assemble a toolkit and choose the right tool for the situation. 4. Methods to help you reflect in facilitating – both in real time and post facilitation.	

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	:03	6	<p>Agenda</p> <ol style="list-style-type: none"> 1. We'll cover those 4 points in that order, spending the most time on delivery. 2. We'll have a 10 min break about every 90 minutes. 3. We'll conclude at 4:30. <p>We have 41 participants today. 24 are in ALP's Certified Community Leadership Practitioner program. Our group includes those relatively new to facilitation and there is also a rich presence of facilitation talent among us. So I'm planning to use random breakout groups for sharing & discussing.</p>	
12:45	:45	7	Assessment	
	:02	8	<p>Are we a group or a team?</p> <p>Team:</p> <ol style="list-style-type: none"> 1. Shared task 2. Team boundaries are clear – who's in & who's not 3. Membership is stable 4. Usually a smaller number, e.g., 7 – 15 	
	:03	9	<p>Good teams have:</p> <ol style="list-style-type: none"> 1. A compelling direction – task 2. An enabling structure - roles 3. Complementary strengths & skills 4. A supportive context 5. Expert coaching <p>(Richard Hackman)</p>	
	:02	10	<p>Group:</p> <ol style="list-style-type: none"> 1. Shared interest 2. Membership is often fluid 3. May be large or small <p>Effective groups have:</p> <ol style="list-style-type: none"> 1. Shared norms 2. Supportive context 	
	:03	11	<p>Why it matters</p> <ul style="list-style-type: none"> • A team's priority is generally performance oriented. As a facilitator, you can investigate, or help the group investigate, if the ingredients for a successful team are present. 	
		12	<ul style="list-style-type: none"> • A group's priority may be experience, information sharing & processing, or group comradery or support. As a facilitator, you can help the group harness their own knowledge, resources, and support and help them process. 	

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	:04	13 14	<p>What does the group or team need to do?</p> <ol style="list-style-type: none"> 1. Bond – establishing or strengthening relationships 2. Build – helping a team perform more effectively 3. Develop – Tuckman model & include learning 4. Decide – Project decision or strategic planning are examples. <p>If you're facilitating for another group, asking this question can help leaders of that group think through what they really intend for the outcome.</p>	
	:02	15	<p>In what ways can a facilitator help this group or team?</p> <ol style="list-style-type: none"> 1. Allow a leader to be a participant 2. Bring neutral or independent guidance to the process 3. Bring a level of expertise, knowledge, or skill that doesn't exist in the group or team 	
	:02	16	<p>Assessing what the community needs</p> <p>Good facilitation is critical for developing deeper community conversations. These are often deeper, more emotional, and we may be wrestling with a systems view of things – from various perspectives. For facilitators, facilitating these conversations can hold a lot of risk. But the reward is parts of the community can move forward better when the conversations are constructive.</p>	
1:05	:10 :15	17	<p>Small Group Discussion – Divide into random groups of 5:</p> <p>Ask that that groups appoint a report out person and a facilitator.</p> <p>In what ways have your community conversations changed during the past several years?</p> <ol style="list-style-type: none"> 1. What risks have you encountered with deep conversations? 2. What rewards have you seen come from deep conversations? <p>Report outs</p>	
1:30	:35	18	Preparation	

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	:03	19	Structure & Flow <ul style="list-style-type: none"> Start with your objectives – what does the group/team want to accomplish? What kind of curriculum, tools, & activities will best serve the group’s intentions & its environment? Then think about the general progression of how you want the facilitation to go. 	
	:03	20	Some examples: <ol style="list-style-type: none"> From a collection of individuals → to a group → to forming a team Meet → Explore → Learn Divergent ideas → Convergent ideas → Decision Hindsight → Insight → Foresight What I used to think → What I now think → What I wonder 	
	:02		Ask for other frameworks – via chat	
	:03	21	Who is in the group and what might they need? <ol style="list-style-type: none"> Special accommodations? What experience or knowledge exists among the group? What’s the context in which they’ll show up? (Use Dayton as example) Any conflicting beliefs/attitudes & and at what level (high, medium, low) 	
			Ask for other ways people use to prepare for a particular group	
	:03	22	Prepare the right physical layout according to your objectives <ol style="list-style-type: none"> Tables or groups – enhances discussion Semi-circle or circle – signifies equality & invites inclusiveness Classroom – efficient use of space that signifies individual orientation toward the front of the room Auditorium – efficient use of space – often signifies a performance-style presentation or talk. Others? – via chat	
	:10	23	Prepare the right virtual set up and capabilities <ol style="list-style-type: none"> The producer The set designer The director The actors Others? – via chat	
	:04	24	Map out your facilitation plan <ol style="list-style-type: none"> Organize the topics under your flow Plan out the clock time, elapsed time, visuals, activities (including props), facilitator notes What visuals you’ll need & where – trend I see is toward limited visuals & added emphasis on discussions, activities, reflection Use a check list Share my example for this session	

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	:02		Pre-meeting/session messages	
	:07	25	Personal preparation – your role as facilitator <ol style="list-style-type: none"> 1. Constant focus on and attend to the group as a whole. It’s always about them. Mentally rehearse scenarios you think might play out in the session. 2. Your ability to manage ambiguity and information overload can help them do the same. 3. Process your misperceptions and emotional reactions. 4. Be aware of your own thoughts and reactions relative to what the group really needs from you. 5. Focus on helping the group develop so they can ultimately self-facilitate. Ask what kinds of preparation other find helpful?	
2:05	:10		Break	
2:15	:	26	Delivery	
	:05		Facilitating in pairs Why this practice holds advantages	
	:03 :02 :03 :02	27	(1) Quickly set the stage (first click) <ol style="list-style-type: none"> 1. Very general agenda with specific times for start, breaks, lunch, adjournment 2. A few overall expectations of the group 3. Appreciation for the group and organization 4. The group/team should quickly and briefly know why you’re there and why you deserve to be there 5. Why I like to quickly get started with an activity. (Second Click) <ol style="list-style-type: none"> 6. Ground rules – how many? 7. How to summarize using Angeles Arrien: <ul style="list-style-type: none"> • Show up and be fully present • Pay attention to what has heart & meaning • Tell the truth without blame or judgement • Be open to the outcome, not attached to it. (2) Addressing an elephant in the room or recent event (use Dayton example)	
2:25	:05	28	Large group question Please raise your virtual hand if you have an effective opening, energizer, ice breaker that you can share.	

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2:30		29	(4) Working with challenging behaviors I'm going to go through some common challenging behaviors and then give you an opportunity in small groups to discuss your experiences & how you've dealt with them.	
	:02		1. Intervening when conversations begins to fragment. "How does this relate to our topic?"	
	:02		2. Identify & intervene if dysfunctional behavior	
	:03	30	3. Challenging behaviors slide - When there's a dominant personality/talker: <u>Observation</u> – looks like we have a mix of extroverts & introverts. <u>Value</u> – I'd like to give the introverts a chance to weigh in here. How about someone who hasn't had a chance to add their comment? <u>Question</u> – When someone seems to be speaking for the whole group. Test with, "How many people..." <u>Request</u> – Would this - table/group/person to give us your opinion	
	:10	31	Small group discussion – divide into random groups of 5: Select a facilitator and a report out person. What is the most challenging situation you've ever had to facilitate? 1. What did you do that worked well? 2. As you look back, is there anything you wish you had known about or done differently?	
	:10		Report outs	
	:03	32	4. Working with different perceptions & attitudes: <ul style="list-style-type: none"> • Distinguish observation from interpretation • Practice & model humility • Stay in learning mode 	
	:03		5. Synthesize key points in discussions & key questions to help the group go deeper	
	:02		6. Bring attention to the end result/actions	
3:05	:05	33	(5) Deeper conversations & critical moments <ol style="list-style-type: none"> 1. Setting up psychological safety 2. Prompting & challenging when the group is more comfortable with surface discussion 3. Practice being in continual learning mode 4. Extremely tough conversations - Knowing what you can and cannot adequately address 5. Pausing and honoring a critical moment 6. Helping the group to be aware of its dynamics and how to work with them 	

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	:10 :10	34	<p>Small group discussion – divide into random groups of 5:</p> <p>Select a facilitator and a report out person.</p> <p>How have you successfully prompted a group to dig deeper in their conversation?</p> <ol style="list-style-type: none"> 1. What did you do that worked well? 2. As you look back, is there anything you wish you had known about or done differently? <p>Report outs</p>	
3:30	:10		Break	
3:40	:07	35	<p>(6) Contingency plans – when things don't go as planned</p> <p>Back pocket exercises & discussion questions</p> <ul style="list-style-type: none"> • Small group discussion questions • Group activity <p>Others – ask for virtual hand raise for those willing to share some of their back pocket exercises/activities</p>	
	:08	36	<p>(7) Virtual Tools</p> <p>List of virtual tools and ask for how others have used them</p> <ul style="list-style-type: none"> • Jam board? • White board • Menti meter <p>What are your cool tools? Please raise your virtual hand</p>	
3:55	:30	37	Reflection	
	:03	38	<p>Reflecting in the moment</p> <ul style="list-style-type: none"> • Using cues to read a group & what's going on • Taking a breath when you need to regroup or change direction <p>What do you do that helps you reflect in real time?</p>	
	:02	39	<p>Reflecting afterward</p> <p>Reading feedback & overcoming the emotional hurdles</p> <p>Putting feedback into action</p>	
4:00	:10 :10	40	<p>Activity – Reflections in small groups</p> <p>Divide into random groups of 5</p> <p>Pick someone to facilitate the conversation and someone to report out.</p> <ol style="list-style-type: none"> 1. What are you taking away from today? 2. What will you add to your facilitation repertoire? <p>Come back and share</p>	
4:20	:10	41	Review, wrap up, announcements	
4:30			SESSION ENDS	