

# The Art of Facilitation

## The Super Eight

The steps that are necessary for any meeting to be effective.

1: **Purpose** – Start every meeting by clearly stating the purpose of the group and of this specific meeting. Yes, even if you said it last meeting and even if you think everyone knows – this will ground the team in a concrete purpose and set the stage for redirecting if folks get off topic.

2: **Context** – Set the context by explaining history of this topic briefly and checking context of participants. Give a brief headline on what has been happening with the topic and where we are in the process. Then ask how everyone is doing to see what context others are working within.

3: **Agreements** – Build agreements in the first meeting (even if you have them with people in the room for another project ... this is a new project and new agreements are needed). Keep agreements top of mind in each meeting by referencing them as needed.

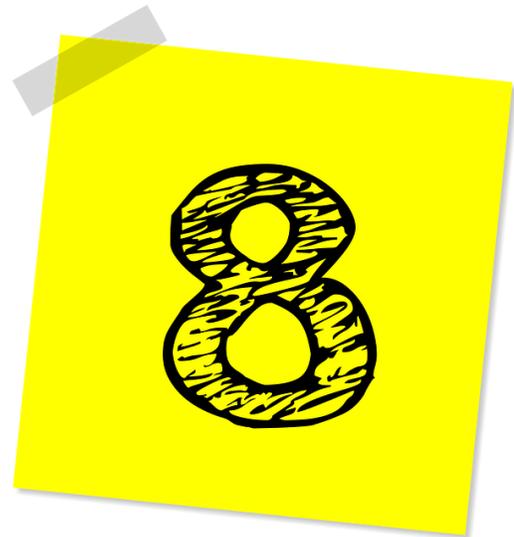
4: **Network/ Stakeholders** – Check to be sure the right people are here. If not, assess if the meeting can continue. Check in on the roles of everyone involved. Who is facilitating, note taking, participating?

5. **Desired Outcome** – Define the goal or outcome we want for this meeting. Yes, even if you said it last meeting. This will ensure you have consensus on this and will keep the meeting on task.

6. **Content** – This will be the bulk of your meeting. Discuss what needs to be discussed (this should be clearly laid out in an agenda in advance of the meeting). Keep the team focused on the task at hand and enforce agreements as needed. Review the status of previous action items. Ask, don't assign. Use solution-focused questions. As action items are identified be sure they are behaviorally based, support the desired outcome, are assigned to a specific person who will complete them, and have a specific deadline.

7. **Next Steps** – Define what needs to happen next by reviewing all action items that have been developed and determine the time and date of next meeting. Begin preparing for the agenda for the next meeting by asking if there are any pressing things that will need to be addressed next time.

8. **Plus/Delta** – Ask what worked about today's meeting worked and what could be upgraded. Be open to feedback from the group – a good facilitator must be willing to accept the feedback and be willing to consider how to improve or enhance their own facilitation to make the meeting effective.



PCWTA is a program of the Academy for Professional Excellence at San Diego State University School of Social Work in collaboration with our University partners, CSU San Bernardino, Loma Linda University and CSU Fullerton



# Stages of the CONTENT Discussion

Open Stage: Gather information	Narrow Stage: Organize the information	Close Stage: Select and agree on next steps
Use open-ended and solution-focused questions, brainstorming, and free roaming discussion. Be sure that each person has a chance to contribute and that all opinions/ideas are expressed.	Narrow the information that has been discussed by considering resources, time, and staffing needed to reach the outcome. Use consensus scale to get agreement.	Prioritize next steps that will help you to reach the intended outcome. Clearly define next steps by identifying who will do what and by when. Set the next meeting to revisit the plan.

Good Facilitation + Strong Project Management =  
An Effective and Gratifying Process

## Indicators of a successful meeting:

### Process

Did the process used in the meeting:

- Encourage participation?
- Facilitate information exchange?
- Lead to decision-making?

### Relationship

Were the interpersonal relationships characterized by:

- Openness and honesty?
- Respect and courtesy?

### Results

Did the meeting result in:

- Informed decisions?
- Clear understanding of who is responsible for which follow-up tasks?
- Agreement on deadlines?



## Project Management Tips:

Good facilitation helps manage a meeting; a project action plan helps manage the broader effort. Using both together leads to success and a process everyone feels good about. Use these tips to manage a project:

- Clearly define the desired outcome.
- Identify the people who are needed to reach it.
- Convene the team regularly using agreements and effective facilitation skills.
- Clarify roles of each team member.
- Determine what small goals must be set and met along the way that will lead to the intended outcome.
- Set benchmarks and timeframes for each goal.
- Assign tasks to specific team members with a specific deadlines.
- Write down the plan and all decisions/action items and review/update it in each meeting to keep the work moving forward.