Best Practices for Supporting and Nurturing ‘Occasional’ Facilitators

This is the third in a set of Innovation Insights providing information and guidance for ‘occasional’ or ‘situational’ facilitators. ‘Occasional’ facilitators are individuals who are expected to or want to take a facilitative leadership role in some of their work unit activities or in a taskforce or project that they may lead. However, facilitation is not their primary function or responsibility. Innovation Insights #28, What Type of Facilitator Are You?, provides characteristics for each of the different types of facilitative roles, including ‘occasional’ facilitative leaders and facilitative participants, establishes the four stages of a successful meeting, and identifies activities for each different type of facilitator to enhance the success of a meeting at each of the stages. Innovation Insights #29, Becoming an Effective Facilitator within Your Own Organization, compares the aspects of internal and external facilitation, and identifies some best practices for internal facilitators. This Innovation Insight focuses on organizational support for ‘occasional’ facilitators.

What is an ‘occasional’ facilitator?

Innovation Insights #28, What Type of Facilitator Are You?, identifies three roles that could result in the individual being an occasional facilitator.

- Facilitative leaders manage meetings in projects or work units, and seek to balance the roles of leader and facilitator.
- Volunteer facilitators have another primary job with other responsibilities, but may volunteer to provide facilitative services, to benefit the unit and their own personal development.
- Participative facilitators are those meeting attendees who have some knowledge of facilitative skills and approaches and apply these tools when appropriate to more effectively use meeting and participant resources and improve meeting outcomes.

An additional group of occasional facilitators could be those who are asked by another person to facilitate a meeting, discussion, or other activity outside of the occasional facilitator’s regular duties and responsibilities.

How can a manager, leader, supervisor, or unit focused on organizational support develop a pool of individuals who will be ready to respond to these requests, needs, and opportunities for facilitation?

Note: This Innovation Insight is the result of a discussion at the 2016 conference of the International Association of Facilitators – North America and Caribbean in a session facilitated by Barbara Sherlock, “Nurturing and Supporting Internal Facilitators”. Contributors to the discussion included Kathryn Jones-Douglas, Veni Apwann, Trinidad and Tobago; Jeremy Kautza, Madison College, United States; Marian Pitters, Pitters Associates, Canada; Georgia Sinclair, Management Institute for National Development, Jamaica; and Mauryan Taylor-Ryan, National Parent Teacher Association, Trinidad and Tobago.
Facilitation has become a popular word

The root meaning of facilitation is to make something easier, from the Latin ‘facilis’ meaning easy. The use of the word facilitate has spread, with architectural design facilitating access and teachers facilitating learning. The focus of this Innovation Insight is on the development of and support for an individual who may be asked to facilitate a meeting or a project team. What exactly are they being asked to do? Plan the meeting? Conduct the meeting? Manage discussion during the meeting when someone else has the lead? Are there expectations for some actions following the meeting?

Facilitation as a process

A facilitator is a neutral enabler of group discussion and decisions. Facilitation is a process, an orderly sequence of steps that leads to an outcome. Facilitators can be thought of as process consultants. Models of consulting can be applied to plan effective and successful facilitation. While three of the better known models differ in the number of steps, they all follow a similar pattern.

<table>
<thead>
<tr>
<th>Steele – three steps</th>
<th>Block – five steps</th>
<th>Kolb and Frohman – seven steps</th>
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<td>Starting, which includes identifying expectations on the part of both the consultant/facilitator and client</td>
<td>Entry and contracting</td>
<td>Scouting</td>
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<td>Middle, which includes diagnosing, planning, and doing</td>
<td>Discovery and dialogue</td>
<td>Entry</td>
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<td>Ending, which includes an evaluation and formal closure</td>
<td>Feedback and the decision to act</td>
<td>Diagnosis</td>
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<td>Engagement and implementation</td>
<td>Planning</td>
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<td>Extension, recycle, or termination.</td>
<td>Action</td>
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<td>Evaluation</td>
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Each of these models involves some information gathering and planning before the actual consulting or facilitation. Thus, the first step in supporting ‘occasional’ facilitators is recognizing that successfully facilitating an event ‘on the fly’, with no advance preparation, is difficult, if not impossible. It is critically important to ensure that when an individual is asked to facilitate, he or she is provided with the background information and time to prepare to ensure that the outcome desired and intended by adding their facilitation will be achieved.

Three components of support for ‘occasional’ facilitators

Within this framework of facilitation as a process, there are three stages where organizational support for occasional facilitators may increase the likelihood of success and continued facilitative activity.

1. Designing and providing training to meet specific needs
2. Providing ongoing support
3. Soliciting feedback about the training, support, and experience of being a facilitator

Designing and providing training to meet specific needs

Find out how an occasional facilitator is usually asked or decides to use facilitation and what specific skills they could use.

- Are they just looking for how to have a more effective meeting? If so, focus on items like meeting
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preparation (an advance agenda), managing time, reviewing decisions and action items at the close of the meeting, and timely distribution of meeting notes.

- Do they want or need to go a bit further? Are they looking for tools to get input from all in the group or options for prioritizing choices or decision making? If so, consider a coaching or mentoring approach to provide just in time information, training, and/or practice.
- Do they rely on one activity or tool, regardless of the situation or meeting type? Help them to realize that one tool or approach does not fit well in every situation and with every group. Help them also to develop a perspective broad enough to realize that one activity can be used to achieve varied outcomes.

Providing ongoing support

Support should be multidimensional, making use of both technology and the benefits of face-to-face meeting and information exchange.

- Have basic reference material available 24/7, probably in an online system.
- Offer regularly scheduled live meetings (face-to-face or using technology) where occasional facilitators can share experiences, talk with each other about specific situations they have encountered, ask for and receive or provide input on current questions, try new approaches, and further their learning.
- Consider e-mail or social media reminders to reinforce learning or encourage use of new or different approaches that have surfaced in earlier training or discussions.
- Support time and, when possible, funding for further development through external sources, either online or face-to-face, to meet specific needs or broaden perspectives and repertoires.

Soliciting feedback

Finally, to close the loop, get some feedback about the support being provided to the occasional facilitators. Is it meeting their needs? How can it be enhanced or expanded?

- In terms of the content being provided, the ‘what’ of the support:
  - Are they using what they learned? Where can they apply it? Is it helpful?
  - What additional training or discussions would they like to have?
- In terms of the ways the information is being provided and shared, the ‘how’ of the support:
  - What are the relative benefits and disadvantages of reference material, regular meetings, and the other approaches in place or considered?
  - What are the best delivery methods for different sets of information?
- In terms of how to get feedback to and from the occasional facilitators:
  - Do they want to share information, whether in a regular live meeting or in a community blog, about what they have been facilitating, what tools and approaches they have used, or what challenges they found?
  - Would they like peer or other observation of their facilitation to provide them non-judgmental feedback and tips?

The feedback gathered should provide insight for future support of occasional facilitators.

- What other knowledge or support do they need?
- How are their facilitation experiences going? Is facilitation something they would like to continue doing, or do more of?
- Should more individuals be brought into the pool of occasional facilitators?
In closing

Just providing initial training is not enough to ensure success for occasional or situational facilitators. Once the occasional facilitator is introduced to the basics of facilitation, they need a means to ask questions as they arise, get answers, and dig deeper into the field. To support the occasional facilitators, find out what they want to learn next and how to make it available to them. To keep them engaged, and make use of their growing knowledge and experience, develop a cohort of occasional facilitators whose members can support each other. Providing occasional facilitators the ongoing skills and support they need will enable them to share the value of facilitation, one successful event at a time.

References and Resources


