



Fact Sheet: Facilitation - Tools of the Trade

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Facilitation skills can and should be a key component of any funder's toolbox. From board meetings, to conversations with grantees, to meetings with fellow funders, well-facilitated meetings can mean the difference between productivity and frustration. Luckily, good facilitators are made, not born.

Simply put, skillful facilitation can make your meetings more efficient, engaging, and enjoyable for all involved.

For our purposes, let's consider a meeting to be any time two or more people come together to share information, brainstorm ideas, or make a decision. As funders, you may participate in board meetings and site visits, committee meetings and funder collaboratives, grantee convenings and focus groups, staff meetings, and more.

Note: Good facilitation is critical to virtual meetings as well as in-person ones. When facilitating virtual meetings, take into consideration the experience of remote participants as well.

Ten Tips for Exceptional Facilitation

At a national conference of Exponent Philanthropy, the following tips were shared during a lively, interactive session.

- **Plan, plan, plan.** Most facilitation success simply comes down to good planning. If we truly take time to plan well, from considering logistics to crafting smart agendas to prepping participants in advance, we've won half the battle. A good rule of thumb is to commit twice as much time to planning the meeting than the meeting actually takes.



Check out the appendix to this document to find a Meeting Facilitation Template that will help with planning for the meeting.

- **Engage the right stakeholders.** As you think about what you want to accomplish at a meeting, consider who needs to be at the table—and who does not. If you find that parts of your meeting require a larger or smaller group, don't hesitate to plan accordingly.
- **Have a strong agenda.** A thoughtful agenda is the road map for a successful meeting. Start by identifying your goals. What do you want to accomplish? Then, design your activities and discussions to serve those goals. Be realistic about what can be accomplished in the time available and prioritize those topics that will benefit most from group discussion. Agendas are not, however, set in stone. Deviating from an agenda can sometimes be the most sound course of action.
- **Be clear about the meeting type.** Meetings take all shapes and sizes: informational meetings, brainstorming meetings, input-gathering meetings, decision-making meetings, multi-day retreats, and more. As you plan—and communicate with your stakeholders—be clear about what type of meeting you are facilitating.
- **Be clear about roles.** What roles will individuals play? Who will facilitate all or part of the meeting? Who will keep time? Take notes? Manage logistics? One person need not—and should not—do it all. Particularly for long or complex meetings, be sure to divide the roles.

When thinking about key meeting roles, do your best to identify the positional leader, the person others defer to because of position or title. This person may be a senior board member, an executive director, or a board chair. But that person might not be facilitating the meeting. At times, it can be helpful—and a strong moment of power sharing and role clarification—for the positional leader to explicitly affirm the facilitator. For example, a board chair may simply say, I want to thank Jane for leading today's discussion. I look forward to participating.

- **Those who facilitate within their organizations encounter a tricky balancing act:** fulfilling the facilitator's role while also having skin in the game. In-house facilitators help to guide conversations and keep meetings on track while, at the same time, having personal perspectives to voice. In-house facilitation is certainly acceptable and can be



done well—for example, by stating explicitly, I’m going to step out of my role as facilitator now and weigh in, because I have some information and opinions I’d like to share.

- **Use visuals wisely.** Your choice of low-tech or higher-tech visuals depends on the group, the meeting type, and your facilitation style. For smaller meetings, an easel pad or white board and markers may make the most sense. For larger meetings using a projector and slides would be more appropriate. What matters most is that your visuals help to strengthen the agenda and serve its goals.
- **Logistics matter.** Location, timing, room temperature, high-protein snacks for brain power, attentiveness to accessibility issues, thoughtful breaks, and the like all help to make for successful meetings. Do not overlook these sometimes small details.
- **Pre-empt trouble.** As you prepare for an upcoming meeting, you’ll often know what the likely trouble will be. Perhaps there are too many items on the agenda and too little time. Perhaps it’s an individual who never does prework or never shows up on time. Perhaps it’s a dominating personality who never allows space for others to speak. Or perhaps it’s simply knowing that the group prefers to chat for a half-hour before any meeting.

Rather than simply wishing for the challenge to disappear, address these challenges in advance. Agenda too jammed? Consider what can come off or be addressed by a smaller group in advance. Dominating personality? Spend time with the person before the meeting to hear any concerns—and perhaps give him or her a portion to facilitate. Group need 30 minutes to chat? Build that time into the meeting agenda.

- **Facilitate from any seat.** Even if you’re not the facilitator or positional leader, you can help to make meetings better. You can ask, in advance or in the moment, can we pause to make sure we are all clear about our goals for this meeting? You can name what you see going on: It seems like we are really stuck on this particular detail. You can help keep time: I see that we only have 20 minutes left. What would be the best use of our remaining time? If spoken genuinely from a place of respect and helpfulness, your support is likely to be appreciated by the facilitator and the group.
- **Facilitators play many roles.** As a facilitator, you must be prepared to play many roles. Facilitators keep the meeting on track and focused on the agenda at hand—and deviate



thoughtfully from that agenda if a situation warrants it. They echo back concepts and ask for clarification. They are a keen listener and observer—both to what is said and to what is communicated through nonverbal body language. They create space for all voices to be heard and help move groups toward decisions when needed. They ensure that clear action steps and responsible parties result from the time together, and they make time for thank yous to be expressed.

Here are a few more tips for those who will be facilitating meetings.

Facilitate conversations that build trust and commitment. So how does a meeting facilitator build trust? Do what you say you will do – shows dependability. Be approachable and friendly. Show support for participants, even when they make mistakes. Work hard to win over people by being respectful of their ideas and perspectives. Balancing the need for results with being considerate of others and their feelings. And most of all, ensuring that your words match your actions – not just some of the time but all of the time.

Choose the most appropriate decision-making style for the desired outcome. What method will help get the most out of the group and leave people feeling the best about the results? Just asking for consensus isn't enough! Here's a link to a great article entitled *Five Useful Methods for Group Decision Making* <http://meetingsift.com/5-useful-methods-for-group-decision-making/>

Be the mirror, use their words not yours. Confirm that you are present in the room and far from your cell phone by repeating what's being said, using their own words and adding the phrase “this is an interpretation” when you want to connect the dots between conversations.

Assess and manage the effectiveness of meetings. Measuring the effectiveness of a meeting is a powerful way to make sound decisions and wise use of time. There are several ways of doing this: get verbal feedback prior to wrapping up the meeting; send out a survey post-meeting; if there are action items make sure that these are documented and followed-up; assess how well was the agenda followed; and, most importantly, did those invited turn up to the meeting.

Foster a collaborative environment. Be clear on the purpose of the meeting and communicate expectations. You don't want participants having any misunderstanding about what is to be accomplished. Encourage people to contribute their knowledge and ideas. You want to leverage



their strengths, encourage innovation and ‘out-of-the box’ ideas. And as a facilitator, if you promise to follow-up on a point or issue raised, keep promises and honour requests.

Increase accountability for ongoing results. Accountability is about ownership and initiative. This means that when someone says they will do something they follow through and get it done. When people are not accountable, one person’s delay becomes everyone’s delay.

At the end of the day, every meeting is an opportunity for culture change. Dramatic shifts won’t happen overnight, but persistent, thoughtful planning and well-facilitated meetings can move organizations toward greater effectiveness, impact, and joy.

Thanks to Exponent Philanthropy for permission to use excerpts from their document entitled “Facilitation: Tools of the Trade”