



FACILITATION LEARNING COHORT

Knowledge Brief

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THREAD
STL

Introduction

Purpose

This document serves two core purposes:

- 1) To document the knowledge and resources generated and shared by participants in Thread STL's Facilitation Learning Cohort (FLC); and
- 2) To create a living document which other Thread STL members can learn from, contribute to, and build off as they continue to explore pertinent knowledge, skills, and resources for successful facilitation of community partnerships.

Guiding Statement

This group explored the foundational knowledge, skills, and tactics necessary for meeting and community partnership facilitation. With assistance from Thread STL staff, participants curated relevant resources and shared advice, tools, and tips with one another to help build each other's confidence in meeting and partnership facilitation.

Methodology

This brief was prepared by Daniel Gerdes, MSW – Thread STL Coordinator at Social Innovation St. Louis. The information contained in this brief was synthesized from direct facilitation and observation of the FLC, discussion and debrief conversations with other Thread STL staff, and from FLC meeting evaluations.

Context

Leaders and managers of community partnerships are the core staff, or volunteers, guiding a coalition of change-makers toward achieving their shared goals and desired outcomes in service to the ultimate outcome: population-level change. One central task in this work is planning and facilitating meetings.

As leaders or supporters in their respective initiatives, members of the FLC facilitate processes and dialogue among the participants in their community partnership to help the group reach their shared goals. This cohort was formed to provide a refresher-course on the core skills, processes, and tactics used in facilitation. When community partnership managers and supporters are more confident, skilled facilitators, their community partnerships can thrive.

The Facilitation Learning Cohort (FLC) began meeting in April 2018 with an initial group of eight people, after which two members withdrew and one new member joined:

- **Maia Elkana**, *Board President* – Gateway Women’s Action Fund
- **Shontay Ford**, *Project Coordinator for Out-of-School Time* – East Side Aligned
- **Hannah Allee**, *Systems Specialist for Out-of-School Time* – East Side Aligned
- **Nataly Garzon**, *Specialist in Systems Change Strategies* – Ready by 21
- **Meihsi Chiang**, *Evaluation Project Coordinator* – Brown School Evaluation Center
- **Kristin Bengtson**, *Associate Director of Community Strategy at NCADA*– NCADA
- **Casey Locey**, *Early Childhood Resource Manager* – Collective Impact Network
- **Megan Riechmann**, *Senior Resource Manager* – Collective Impact Network
- **Jerri Johnson**, *Senior Resource Manager* – Collective Impact Network

Hopes and Priorities

Upon the FLC’s initial meeting, participants took time to identify their aspirations for the group. The ensuing list served as a target for the group’s discussion and activities:

- To be more confident in facilitating meetings intentionally (identifying what activities to use, what questions to ask, and why);
- To build relationships with others in the group and make connections to experts or resources outside the group;
- To develop/enhance skills to guide group decision-making and facilitate challenging conversations;

- To identify resources to help continue building facilitation skills outside the FLC.

Meeting Summaries

Meeting	Activities
April 12th, 2018	The objective of the first meeting of the FLC was to identify group norms, shared learning objectives, and to break the ice and get to know fellow participants and their motivations for joining the cohort. The activities used during this meeting included “Connection Circle” and “Hopes and Fears” to help break the ice and invite participants to share their motivations for signing up for the cohort and what they wanted to get out of the program.
May 10th, 2018	The second FLC meeting focused on narrowing the topics from “Basics of Facilitation” to some specific facilitation basics. Cohort members completed a Facilitation Self-Assessment and discussed a Community Toolbox learning module from the World Health Organization at Kansas University’s Collaboration Centre.
June 25th, 2018	At the third FLC meeting, Megan Riechmann and Casey Locey from the St. Louis Collective Impact Network shared background about and upcoming meeting and asked the group for feedback on some challenges they are facing while planning meeting activities and other logistics.
July 12th, 2018	For the final meeting Kristin Bengtson from NCADA shared another case study example of a challenging facilitation experience from the past. The meeting ended with a reflection activity and time for participants to discuss what they learned and how the cohort could be better in the future.

Key Insights

Meeting Pre- and Post-Work

While often overlooked, “pre- and post-meeting” work is an essential part of successful facilitation. Sharing a brief agenda and objectives with attendees before a meeting can help boost attendance and prepare attendees to confidently participate in planned activities. Securing a meeting space that accommodates the needs of meeting activities and attendees will make your meeting flow seamlessly. Timely follow-up with meeting minutes, action requests, and other pertinent information will ensure meeting and coalition members remember any assigned “homework” and will keep absent members up-to-date on progress made in their absence.

Selecting Activities and Processes to Meet Objectives

During a meeting, it’s important to select activities or processes that keep attendees engaged *and* help the group achieve the intended meeting outcomes. Regularly soliciting feedback from meeting participants about the usefulness of meeting activities will increase participation and buy-in from attendees *and* will help keep the group on-track to meeting their shared objectives. Consistently implementing this practice will ensure your group’s meetings remain aligned with the overall objectives you set out to achieve.

Anticipating Facilitation Challenges

Taking the time before meetings to assess potential threats or barriers to success can be critical to the success of a meeting. Planning the right activities, finding the right space, and inviting the right people can go a long way in supporting a successful meeting. Anticipating controversial items on your agenda or challenging power dynamics between attendees can set you up for success if your meeting is derailed. Ask colleagues and friends who have history with or knowledge of the group to help you think through the power dynamics and how to overcome them should they derail your agenda.

Next Steps

Build on the Basics

Upon recommendation of FLC participants, another facilitation-focused cohort could continue to build upon the basics of facilitation, calling upon expert facilitators to help participants build their skills around such topics as:

- *reading the meeting room,*
- *designing activities to achieve shared goals, and*
- *engaging all participants in your meeting.*



Meeting Resources

Meeting	Resources
April 12th, 2018	<p><u>Connection Circle</u> - Use this tool to identify connections between a seemingly unconnected group of topics or to help the group prioritize and select their shared objectives.</p> <p><u>Hopes and Fears</u> -- This activity is designed to help break the ice in the group and to familiarize members with each other's motivations for joining.</p>
May 10th, 2018	<p><u>Facilitation Self-Assessment</u> -- This self-evaluation document can be used to help you assess your adherence to a number of basic facilitation skills and processes.</p> <p><u>What are Facilitation Skills?</u> -- A brief primer on facilitation skills provided by the KU Community Toolbox.</p>
June 25th, 2018 & July 12th, 2018	<p><u>Thread STL Peer Learning Question Guide</u> -- A questionnaire to guide thinking for a peer-to-peer skill share or roundtable support activity.</p>

Outside Resources

[Scriptapedia](#) -- This resource is curated and provided by the Social System Design Lab at the Brown School of Social Work at Washington University. The resources contained on this website are geared toward group model building workshops but can be easily adapted and used for nearly any facilitated group activity.

[John McClusky's "Meeting Action Summary" template](#) -- This template can help you keep detailed notes of each of your meetings and ensure you don't miss any important meeting details and decision points.

[Thread STL Detailed Meeting Agenda Template](#) -- The detail agenda template will help you plan each meeting, step by step, to keep you on track and help anyone step into the facilitation role and be ready for success.

- [Facilitation Cohort Detailed Agenda Example](#) -- an example to draw from.

[Developing Facilitation Skills: A Handbook for Group Facilitators](#) -- by Patricia Prendiville. A book with extensive detail on developing your facilitation skills, divided into chapters by major facilitation skill categories.

[Facilitator's Guide to Participatory Decision-Making](#) -- Sam Kaner. Another book to help develop facilitation skills, particularly focused on helping groups make decisions and achieve shared objectives.

- [Instructions for Opening this E-Book](#) -- follow these instructions for use.

[Your Facilitation Checklist](#) -- A quick checklist for facilitating meetings and coalitions provided by the KU Toolbox.

[What are Facilitation Skills?](#) -- A brief primer on facilitation skills provided by the Community Toolbox.