

The **Facilitator  
Excellence  
Handbook**

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Second Edition

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FRAN REES

**Pfeiffer**  
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# About This Book

## Why is this topic important?

Facilitation skills are by far the most valuable skills for leading any kind of group communication, problem solving, or decision making. Facilitation has become a critical and powerful method of leadership, especially in organizations that rely on input and commitment from all employees. Leaders, team leaders, managers, trainers, counselors, human resource professionals, salespeople, mentors, and, of course, facilitators, will benefit from the concepts, tools, methods, and information provided in this book. In one-on-one communication, facilitation skills help people reach verbal agreements that are supported with action and follow-through. Whether working in cross-organizational settings or cross-functional teams, negotiating sales contracts, designing and leading meetings, resolving conflict, or collaborating one-on-one, professionals benefit greatly when they are skilled in facilitation.

## What can you achieve with this book?

This book is a resource to both new and experienced facilitators and can serve as a textbook for anyone who teaches facilitation. The reader will find this book a handy reference as well as a comprehensive coverage of facilitation. It helps readers understand the facilitator's role and a full range of skills, processes, and knowledge needed to become an effective facilitator. Recognizing the many types of situations facilitators may face, this book presents basic skills and also addresses a variety of facilitation opportunities, challenges, and problems.

## How is this book organized?

The reader will find a discussion of the role of the facilitator in Part 1, a comprehensive description of many verbal and nonverbal techniques in Part 2, and step-by-step processes and tools in Part 3. Part 3 also contains chapters on how to facilitate conflict resolution in groups and how to facilitate difficult situations. Instruction in designing and leading group work is featured in Part 4, and Part 5 illustrates how various levels of facilitator competency are called for in different types of group and organization work. Part 5 also discusses facilitating meetings, teams, virtual teams, and organization-wide projects. Finally, Part 6 discusses the art of facilitating and what makes a great facilitator. A CD-ROM is also included that contains a Facilitator Skills Profile as a PDF. The Profile can be printed, distributed, and completed. The reader receives scores in eleven competency areas with suggestions for further reading in the book.



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*Essential resources for training and HR professionals*



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## Getting the Most from This Resource

**F**acilitators are entrusted with an exciting role: to create an atmosphere of trust and synergy from which come results. In a world of experts, specialization, and ever-changing methods and technology, there is a critical need for facilitators to help people collaborate, innovate, and collectively meet the challenges of today's world. The purpose of this book is to develop and foster excellence in facilitators—and in so doing increase the ability of people to work creatively and productively together.

Bringing people together to solve problems, plan, make decisions, and obtain resources requires both the science and art of facilitation—a powerful and essential form of leadership. Collaboration among diverse professionals and workers does not happen automatically when people come together, even when people sincerely desire to cooperate. When people must work in groups to plan, decide, innovate, implement, and share responsibility, they need facilitators who inspire them to put forth extraordinary efforts to accomplish what cannot be achieved by individuals alone.

### What's New in the Second Edition

This second edition contains four new chapters: Facilitating Difficult Situations, Facilitating Conflict Resolution, Facilitating Virtual Teams, and What Makes a Great Facilitator? These chapters round out the first

edition's focus on skills and basic techniques by addressing some of the more difficult aspects of facilitating. The chapter on virtual teams explores dilemmas facilitators face when the teams and groups they work with are scattered geographically. Suggestions are presented to help facilitators deal with the very real challenges of today's global workplace. The chapters on difficult situations and conflict resolution give facilitators ideas and processes for guiding groups through some of the typical problems groups face when working together. The chapter addressing the question of what makes a great facilitator promotes the concept that facilitation is more than skills and techniques and gives facilitators direction in developing a "core purpose" for facilitating.

Also included in this second edition is a CD-ROM of the Facilitator Skills Profile (formerly sold separately as a booklet). This questionnaire allows the reader to evaluate his or her level of facilitator skill, identify strengths and areas needing improvement, and find quick references to sections in the book that relate to specific skills.

## Definitions

The terms *facilitate*, *facilitator*, *facilitation*, *group*, and *team* are used frequently throughout this book. Definitions of these terms as they are used here are given below:

- *Facilitate*: To make easier or less difficult.
- *Facilitator*: A person who makes a group's work easier by structuring and guiding the participation of group members. Facilitators generally work in a meeting setting, but can also work with a group outside of meetings. A facilitator may also take a neutral (questioning and listening) role when helping others.
- *Facilitation*: Any meeting of a group of people at which a facilitator structures and manages group process to help the group meet its goal. A facilitation may also be a meeting between two people: a facilitator and an individual who accepts process help and guidance.

- *Group*: A collection of individuals with a reason for being together. Membership in the group may be voluntary or imposed. The life of a group may be short or long and its formation either extemporaneous or planned.
- *Team*: A type of group whose members and leader work closely together to achieve mutually agreed-on goals. The word “team” implies interdependence and synergy; a team can be thought of as a closely knit, well-functioning group. In addition to accomplishing goals and tasks as a group, a team strives to become a cohesive unit and to improve the teamwork skills of its members.

## Facilitation as Science and Art

Facilitation is both a science and an art. A facilitator applies a specific set of skills and methods, “group technologies,” along with a sharp attention and sensitivity to people, to lead a group to peak performance.

Facilitators skillfully blend group technologies with personal style to create the art of facilitation. A truly skilled facilitator makes this form of leadership appear effortless by artfully combining structure with freedom so that the group can operate with maximum flexibility and creativity within realistic boundaries.

Facilitation skills are becoming as essential to professionals as presentation and traditional communication skills, if not more so. Facilitation has become a vital communication skill, particularly effective in group and team settings, in which everyone’s input, support, creativity, and collaboration are needed. Professionals in many walks of life are being called on to work effectively in group settings in dynamic and challenged organizations. Presentation and traditional communication skills are not adequate to meet the demands of fast-paced, changing, or technically driven companies. As companies and organizations rely more and more on individual employees to contribute to process improvement, quality control, innovation, planning, decision making, and cost management, facilitation becomes a

critical skill for many professionals. In business, community, educational, and religious organizations, the demand for people who can facilitate groups and meetings is increasing. In today's organizations, facilitators add an essential ingredient to discussions, meetings, teamwork, and overall organizational effectiveness.

Facilitation skills are also important in one-on-one communication situations, which call for clear communication, planning, commitment, or resolution of previous misunderstandings.

## Levels of Facilitation

This book addresses three levels of facilitator skill development:

- I. The Meeting Facilitator
- II. The Team Facilitator
- III. The Organization Facilitator

The facilitator role becomes more complex at each level. Basic facilitation skills are beneficial when one is leading a discussion or a meeting; managers, leaders, and most professionals frequently find themselves needing to facilitate meetings and could benefit from having Level I skills.

Team facilitators (Level II) are needed to work with ongoing work teams, self-directed teams, or cross-functional project teams. Teams need facilitation for their ongoing meetings, as well as coaching and training in working together as a team. Facilitating a team requires knowledge of how a team develops over time and the ability to teach and demonstrate group processes and methods to the team. In many organizations, the team leader must function as the team facilitator at least some of the time. Organizations that rely heavily on work teams and project teams will be more likely to succeed if they have trained team facilitators to support team efforts.

Organization facilitators (Level III) are highly skilled, experienced facilitators who also understand the overall business and cultural issues facing an

organization. They are often essential to major change efforts. Although few organizations have designated “organization facilitators,” there are usually a few professionals and leaders within any organization who evolve into this role because of their skill at facilitating and working cross-organizational issues. These facilitators may be supervisors, managers, human resource professionals, senior trainers, or experienced team or project leaders. They may have had little formal training in facilitation, but have naturally developed and acquired the art, skills, and methods needed to facilitate higher-level meetings, projects, and change efforts.

Many organizations have positions that by their nature require a high level of facilitation skill. Jobs in the areas of internal consulting, organization development, organizational effectiveness, human resource management, and training require people who can work across the organization in a facilitation and leadership role. These people need Level III facilitation skills to do their jobs.

Traditionally, management and leadership training does not address facilitation skills. However, many principles of effective facilitation (working with clear goals and objectives, listening to people, motivating others to participate and become involved, obtaining support and buy-in, collaborating, capitalizing on the creativity and synergy of subordinates, helping people work cooperatively together) are important competencies for managers and leaders as well. Facilitation is truly a leadership skill, essential when leaders want the groups they lead to share in goal setting, decision making, and problem solving. Facilitation is also an essential skill in teamwork, community and volunteer work, and in fast-changing, technical companies that rely on cooperation from several functions to make and implement decisions.

In recent years, companies have downsized to cut costs and have frequently eliminated one or more layers of management. Teams have been put in place and given much of the decision power formerly reserved for middle management. In these downsized companies, facilitation is a skill they cannot afford to do without.

To compete effectively, organizations must collaborate with and listen more to customers, suppliers, and others who have an impact on their success in the marketplace. This requires face-to-face meetings, teamwork, and ongoing cooperation with people from different functions, levels, and organizations. In these diverse group settings, a facilitator is needed: someone who can organize a meeting, lead a discussion, and move people from discussion to consensus. Whoever facilitates such meetings must remain neutral, not be threatened by diversity of opinions, and have methods to manage discussions to a fruitful outcome. Whether this person is a manager, a team leader, a team member, a person from another function in the organization, or an outside facilitator—he or she needs facilitation skills.

It is increasingly common for organizations to operate in more than one country, as well as to serve customers in many countries and from quite diverse cultures. Facilitators and organization leaders are faced not only with the challenge to foster collaboration throughout a geographically close community but also to ensure open channels of communication among teams, customers, and vendors from different parts of the globe. Problems must be solved not only cross functionally but also cross culturally, with distance being a key factor in getting people to work productively together. Facilitators today must coach and influence teams to develop rapport and cooperation with people whom they may never meet face to face but who even so may provide critical support and input to their jobs as team members. Facilitation skills must be adapted and applied to electronic communication and geographically distant teams and groups.

## **How This Book Is Organized**

Part 1 of this book gives an overview of facilitation and the role of the facilitator. Part 2 describes in detail the verbal, nonverbal, and recording skills required of facilitators. In Part 3, various facilitation methods and

tools are described that help groups be productive. Instructions are given for how to use each tool. Part 4 focuses on designing an effective facilitation after assessing the group and situation. Several examples of how to organize and enhance group work are included, along with detail on how to open and close a facilitation. Part 5 focuses on the facilitator in action and looks at several types of assignments: the meeting facilitator, the team facilitator (both face-to-face and virtual), and the organization facilitator. A Facilitator Competency Matrix outlines required skills for the three types of facilitation assignments. Part 6 concludes the book with chapters on managing oneself as a facilitator, the art of facilitating, and what makes a great facilitator.

The CD-ROM in the back of the book contains the Facilitator Skills Profile, a fifty-five-item questionnaire to help readers assess their level of skill as a facilitator. Those who print out and complete the questionnaire can determine their score to indicate the overall level of skill they have achieved: beginning, improving, basic, skilled, or mastery. In addition, a Facilitator Competence Profile Graph can be used to determine levels of competence in eleven areas: attitudes, role understanding, participation, group memory, consensus, designing meetings, managing meetings, tools and methods, feedback, listening, and group dynamics. The reader is guided to identify areas of strength and areas needing improvement, along with suggestions for how to improve as a facilitator.





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# Overview of Facilitation

Facilitation is a form of leadership. Facilitators, like leaders, have the opportunity to play a special role: to inspire, direct, and structure participation among people so that creativity, ownership, and productivity result. Because of this, facilitation skills are a critical factor in an organization's success. The first two chapters of the book explore Facilitation in Organizations Today and the Role of the Facilitator.



# Facilitation in Organizations Today

A fact of organization life is that groups are needed to do what cannot be done by individuals alone. However, groups are not always effective. Most of us have experienced a lack of progress in groups made up of capable and talented individuals. When left alone, without training or methods, groups can bog down in a variety of ways. Some typical things that impede progress in group settings are:

- Poor attendance by members;
- Too few meetings;
- Too many meetings;
- Long-winded discussions without resolution;
- Lack of clear group goals;
- Lack of agreement about goals;
- Change in group goals or focus;
- Lack of resources;

- Dominant group members (or leader);
- Unresolved disagreements;
- Personality differences and clashes;
- Lack of buy-in to group goals or decisions;
- Absence of a group leader;
- Lack of leadership ability;
- Members interrupting one another;
- Long-standing differences causing lack of cooperation;
- Problems resolved too quickly and ineffectively;
- Opposing factions, departments, or organizations;
- Personal agendas affecting member behavior and opinions;
- Members giving in to decisions without really supporting them;
- Decisions and actions not written down, so members “forget” or are not clear about what was said from meeting to meeting;
- Breakdowns in communication due to geographically separated group members; and
- Misunderstandings and other problems due to cultural differences or lack of cross-cultural understanding or both.

The list could go on and on. A group is as complex and difficult as the sum total of the problems and people that comprise it. Without skilled leadership and proven methods, groups will be minimally effective. Over recent years, organizations have increasingly drawn on those with facilitation skills to help groups be more productive.

Organizations use facilitators in a variety of ways. Some identify and develop facilitators whose main job is to facilitate. Others use a core of facili-

tators who spend a percentage of their work time facilitating. Still others train team leaders, managers, and human resource professionals in facilitation skills and rely on these professionals to facilitate as an important part of their jobs. From time to time, organizations also use outside consultants or trainers to facilitate special meetings or team efforts. Of course, some organizations use a combination of all these approaches to fill their facilitation needs.

In many organizations, those with human resource responsibility are seen as a natural pool of facilitator talent. Although human resource professionals may be the most trained and experienced in facilitation, relying on them to facilitate may be self-defeating. First, it overloads the already busy human resource person. Second, it assumes that facilitation is only for special occasions and that someone outside the immediate group must be called in—thus limiting the development of facilitation skills by others. Third, it severely limits the pool of facilitators available to an organization. A better strategy is to target people within each major department or group to be trained in facilitation skills.

Although most organizations recognize the benefits of having a facilitator at meetings and of having leaders who can facilitate groups, few actually assess their need for facilitation skills or for strategically developing the facilitation skills of their employees. Few management or leadership training programs include facilitation skills, although increasingly leaders are seeking out resources and training in facilitation and team leadership.

## **Benefits of Facilitation**

Facilitation improves group effectiveness by overcoming some of the inherent difficulties of working in groups. Most organizations cannot produce or operate efficiently unless people work together and cooperate. Indeed, facilitation skills are critical at all levels in the organization. Employees must be taught the basics of clear and productive one-on-one and group communication. Many of the basic facilitation skills—asking

questions, listening, paraphrasing, clarifying, and summarizing—are useful, even critical, in most organizational settings.

Time and again, the following three topics are cited as the top concerns in today's organizations: *communication*, *teamwork*, and *conflict resolution*. Each of these concerns is related to how people work together and relate to one another, which is the overall focus of good facilitation. In fact, *good facilitation is at the heart of all three of these endeavors*. One of the key benefits of facilitation is that it has the potential to successfully address these concerns. Throughout this book, we will be highlighting skills, methods, techniques, and processes that *foster productive communication, improve teamwork, and resolve the natural conflicts* that arise in organizations and groups.

Managers and team leaders need facilitation skills to capitalize on the synergy of their groups, gain full support and buy-in for important efforts, manage differences and diversity, and successfully work through the inevitable factions and conflicts that arise. Organizations that rely heavily on self-sufficient and self-directed teams are increasingly discovering that something important is missing: facilitators or those with facilitation skills. In some organizations, those with good facilitation skills are in great demand, not only to lead meetings but to take on more and more leadership and management responsibilities.

Some of the most common and important benefits of facilitation are:

- Group members are more motivated to support the decisions made;
- The best efforts of groups usually yield better results than individual efforts;
- Maximum participation and involvement increase productivity;
- Managers and leaders are better able to draw on those they lead as resources, an ability that is critical to organizational success;
- Everyone has a chance to be influential and useful, and people sense that they are an integral part of a team effort;