

The Fundamentals of Facilitation Practice¹

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Facilitation Defined

The Latin root of *facilitate* and the root word *facile* in French both mean “to make easy.” Thus, “facilitation is making it easier for groups to accomplish their tasks” (Haskell & Cyr, 2007, p. 39; Kaner, 2014). A facilitator’s role is to unbiasedly design and manage groups through participatory processes of co-discussions and activities that assist groups in reaching their identified goals and objectives while minimizing issues and increasing effectiveness (Jamieson & Justice, 1998; Kaner, 2014). Schwarz (2002) identified four core values of facilitation that are needed to guide clientele to a successful outcome. The core values include the following.

1. **Valid information** is to be provided by both the facilitator and the participants.
2. Participants engage with **free and informed choice** in mind.
3. Participants have an **internal commitment** to the decisions made throughout the process.
4. Participants show **compassion** for others while engaging in conversation.

In light of a formal definition of facilitation, it may be helpful to discuss the common misconceptions of what facilitation is sometimes represented as (but is not). Here are two examples of such misconceptions.

1. **Hosting/convening:** Hosting an activity such as a meeting or workshop with multiple instructors or speakers differs from facilitating. Remember that facilitation guides a group through processes that help them achieve goals. If you are securing a meeting or workshop location, preparing the space for participants, inviting expert instructors or speakers, and inviting participants, you are convening or hosting an activity.
2. **Presenting/teaching:** When delivering a presentation or teaching, the participants’ focus is on you and the information you are disseminating or teaching. This includes activities such as lectures, demonstrations, and field trips. Participants mostly listen and are not actively engaged in processes that help them reach a goal.

This publication is the first part of an Ask IFAS series on facilitation. Subsequent articles focus on planning a facilitated meeting, implementing facilitation in a meeting, and applications of facilitation in Extension.

The Importance of Facilitation

Facilitation can be an effective tool to increase participatory decision-making, which ultimately helps solve complex problems. Some examples of activities you might facilitate include advisory meetings, staff/faculty meetings, strategic planning, brainstorming sessions, mission and visioning sessions, community discussions, or focus group sessions. A skilled facilitator fosters a safe environment for everyone to express their opinions and encourages everyone to listen to different perspectives. Without facilitation, groups can stick to their conventional ways of participation, which often means there is one or a select few dominant thinkers and speakers, the quiet ones usually get left behind and unheard, differences in opinions are categorized as conflict, unpopular opinions are not encouraged, and people have a hard time listening to others (Kaner, 2014). Without proper facilitation, effective group processes can become difficult quickly rather than becoming easier. Facilitation is a process tool that can be used by anyone leading and managing groups to meet a common goal (e.g., Extension agents, nonprofit directors, government employees, businesses/business owners, volunteers, etc.).

The Role of the Facilitator

The facilitator designs effective group processes that meet the participants’ needs so that the group can reach its desired goals and outcomes. A facilitator is a neutral party who actively controls the meeting process (Schwarz, 2002) while the participants control the result (with their experiences and expertise). Facilitators stimulate and guide participants to do their best critical thinking (Kaner, 2014). In a participatory environment, a facilitator can help to encourage full participation, promote mutual understanding, foster inclusive solutions, and cultivate shared responsibility (Kaner, 2014).

Facilitation Best Practices

Ensuring Neutrality in Facilitation

Facilitation is a neutral process (Haskell & Cyr, 2007). Therefore, the facilitator must be content-neutral and not have a position or opinion on the discussion outcomes. If you are neutral, facilitate the conversation and keep a neutral position throughout the process. If you are not neutral, advise the group to find a facilitator who is removed from the topic or group.

Group Agreements

Group agreements are verbal agreements among the participants about how the group will operate together throughout the process to create a positive and productive environment. The group can come up with the entire list of agreements together, or the facilitator can suggest a few agreements to start and invite the participants to edit or remove the proposed agreements. This practice should occur at the beginning of the facilitated session. Confirm that the participants are willing to abide by these agreements throughout your time together; this creates accountability.

Examples of group agreements include the following.

1. Make space for everyone.
2. Allow and encourage others to contribute.
3. Be hard on the issue, not the person.
4. Give freely of your experience.
5. Ask questions when you do not understand.
6. Provide constructive feedback and receive it willingly.
7. Appreciate the other person's point of view.
8. Keep confidentiality.
9. Stay on topic in discussions.

Using Flip Charts

Recording participants' thoughts on flip charts creates a shared memory of the discussion. It validates that each contribution was heard and produces a lasting record of the conversation. This documentation helps participants continue to reflect on the ideas because they can revisit the notes whenever they need (Kaner, 2014). A chart writer must be able to write legibly, summarize participants' thoughts accurately, and capture what the participant is saying neutrally. A chart writer who can think and write quickly while maintaining accuracy would be the gold standard. The chart writer should also invite the

participants to review the notes. This can be used as a form of member checking in which participants have a chance to verify the accuracy of the interpretation of what they said to the facilitators, increasing the validity of the information collected (Lincoln & Guba, 1985).

Tips for chart writing are below.

1. Write thick letters and be sure to close the letters. Avoid fancy script lettering.
2. Colors such as blue, brown, purple, black, and green are easier on the eyes when reading. Alternating colors between statements is also helpful in distinguishing one thought from the next. Avoid using red and green or blue and yellow together because those color combinations are complex for participants with color vision deficiency.

Summary

Facilitation can help to make it easier for groups to reach their identified goals and objectives. Facilitation requires a skilled, unbiased facilitator who designs a productive process, encourages the group to think critically, and manages the group through participatory engagement. Knowing when to invite an outside facilitator, developing group agreements, and writing productive charts are keys to fundamental facilitation success.

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