

Facilitation tools & techniques

“Coming together is a beginning, keeping together is progress, and working together is success.” – Henry Ford

Facilitation can play an important role in ensuring a well-run meeting or engagement process. Useful facilitation skills include planning agendas, creating the appropriate group environment, encouraging participation, and leading the group to reach its objectives. Of course facilitation can also be used at the organisation, project or community level. A good article if you are new to facilitation is the [Facilitation tip sheet](#) from CDC. The following sites provide guidance to a range of tools and techniques to engage people and mobilize evidence in complex settings involving multiple stakeholders. Links with specific guidance on facilitating virtual teams, events and meetings has been added to this page in response to COVID-19 and the needs of facilitators and the wider world who are exploring and moving towards collaborating remotely. Related links for communicating remotely can be found from the related site pages – [Managing virtual teams](#) and [Managing virtual meetings and events](#).



[Virtual Facilitating in times of Corona](#). This short post from Daniel Osterwalder points out that as facilitators we give topics a voice and make the voices heard – but at the heart of it all we aim to develop and maintain a safe space for people to collaborate. He points to some underlying principles which can be used to help participants gain and build on that trust create this space of trust where those involved can get involved at all levels.



[How to Facilitate Virtual Meetings and Participants](#). Core facilitation skills apply to both face-to-face and virtual meetings. This posting from Terrence Metz provides a clear breakdown of what is different with virtual participation – and how you can address these points.



[Resources for Online Meetings, Classes, and Events – Facilitators for Pandemic Response Group](#). This google docs page is an emerging initial place to share, curate and organize resources for virtual facilitation. It has been set up through the [Facilitators for Pandemic Response Group](#) as a place for those who facilitate online (or need to) can learn, share and make offers to the wider global community of practice as the Covid19 virus plays out.



[Facilitator tool kit](#). This University of Wisconsin-Madison facilitator tool kit is a comprehensive, easy-to-use guide to tools, methods and techniques for assisting groups with planning and improvement projects and interactive meetings.



[Seeds for change – facilitation resources](#). A range of useful guides, tools, exercises and tips for working with groups – just look for the section on facilitation. All Seeds for Change guides are anti-copyright. Feel free to copy, adapt, use and distribute them, as long as the final work remains anti-copyright.



[Liberating structures](#). The liberating structures provide a practical, easy to understand and powerfully simple method to get groups working better together – encouraging participation, dialogue, and action. Developed by Keith McCandless and Henri Lipmanowicz, they encompass a repertoire of over 30 facilitation and group process methods to make your activities fully inclusive and more effective. All have been widely tested and are focused on results. They can be used independently, or [in strings](#) to support the underlying group challenges. Lisa Kimball's Systems Thinker post – [Liberating structures: A new pattern language for engagement](#) – provides a good introduction.



[Group Facilitation and Problem-Solving](#). A guide to conducting meetings and facilitating groups from the University of Kansas' Community Tool Box. Covers: i) Conducting effective meetings; ii) Developing facilitation skills; iii) Capturing what people say; and iv) Techniques for leading group discussions.



[Making Virtual Facilitation a Success](#). IAF has set up this webpage in response to COVID-19 and the needs of facilitators and the wider world who are struggling with collaborating remotely. The webpage includes 3 categories of resources: i) events where you can learn about virtual facilitation; ii) resources for virtual facilitation; and iii) links to communities of practice in this area.



[Library of facilitation techniques](#). This list of tools and techniques from SessionLab covers topics from ice breakers and energisers to issue analysis and strategy development.



[Make your meeting more productive with a check-in](#). Check-ins are an approach to encourage each person in a meeting to speak to their peers. This site has been created by Richard Cohen to support their use. The site provides practical guides to help you choose appropriate prompts to elicit who participants are, how they feel or what they think about an almost limitless range of work-related and personal concerns.



[Participatory action research: Guide for facilitators](#). This guide has been written by Robert Nurick and Marina Apgar as a resource document for the training and capacity building of facilitators who conduct participatory action research (PAR) in the CGIAR Research Program on Aquatic Agricultural Systems (AAS). This guide provides a road map for facilitators to support them in delivering a rigorous PAR process, providing them with guidance for effective facilitation that allows for critical reflection throughout the engagement process. The material in the guide is also relevant to other groups wishing to take a PAR approach to research and community development.



[The Barefoot Guides](#). A convergence of creative ideas, stories, practices and resources from social change leaders and practitioners across the world. Collectively these cover a range of situations that facilitators and others may wish to help their group or community to collectively explore. These exercises are well set out, and help groups work with quite complex issues from addressing power to creating a learning environment. You can also access a growing library of case studies, tools, readings, handouts, diagrams etc. on the website.



The [Systems Grant-making Resource Guide](#). will help you unpack a systems approach so you can apply it to your work and, in doing so, break through obstacles, craft new habits and change your processes to successfully transform systems. This guide provides a selection of the most used and relevant systems assessment tools, frameworks, and processes for grantmakers and the social sector. This includes tools such as: stakeholder mapping, the iceberg, causal loop mapping, systems archetypes, mental modeling, shared visioning, identifying leverage points and designing a systemic theory of change. It includes guidance on how and when to use these tools as well as examples of how they have been applied in the field.

Looking to facilitate large groups



[Facilitating Large Group Discussions and Activities: Make Numbers Count](#). It can be challenging to involve everyone in a large group (often considered 50 or more people), but if you put planning and effort into it, you can draw on all of the tools you have available as an instructor—large

and small group discussions, debates, case studies, learning games, role plays, problem-solving, etc., in addition to lecture. This article by Kelly Tait will discuss general approaches to creating productive interaction in large classes as well as specific tips on how to do it.



[Facilitating Large Group Meetings That Get Results Every Time](#). Facilitating large groups of up to 100 or more participants can seem a daunting task. In this paper Sylvia James and colleagues present 10 principles for the design and facilitation of large group meetings.



[Tips for facilitating large groups](#). This post from Jeanette Long's [Workshops with Wow](#) reminds us that facilitating larger groups provides a different set of challenges for the facilitator and provides a few tips for working with a group this size.

On-line facilitation



[Managing virtual meetings](#). Virtual meeting doesn't just offer opportunities for dispersed teams, it can also be effective in linking more loosely connected networks that might typically only come together for live events like workshops and seminars. Moving to online versions of what are usually highly interactive situations with large numbers of people involves some process adjustment. This LfS page provides links to guidance on how to set up effective virtual meetings with distributed team members – from virtual teams and just when staff are working from home some of the time.

Icebreakers



[Top Team-Building Games: Experts Share Their Favorites online](#). Team-building experts have found that combining fun with learning is one of the most effective ways to improve performance, break down barriers, and tap into hidden potential. Here the SmartSheet team have rounded up nearly 100 of the best games, including favorites from top team-building coaches and consultants. A good selection of icebreakers here regardless of whether your goal is to break the ice, spur creativity, promote better problem solving, or just have fun.