

# FACILITATING SMALL GROUPS – TIPS FOR SUCCESS IN PROCESS FACILITATION

by Debbie Castle

## Introduction

For the past 25 years I have lived and worked in small group settings of 2-30 people. Most often the purpose is for a group to do something that would not be possible for one person to do alone. Hence the need for groups to learn and work together. In most of the small group situations I have been asked to act as facilitator i.e. the person responsible for assisting the group to accomplish what it sets out to do. In French the word “facile” means easy and this is our aim as facilitators to make the work of the group easy. I love this aim and am challenged every time I am asked to facilitate, to come up with a plan and process that will help the group flow in its efforts toward its destination. It is an everlasting creative challenge! I want them to achieve success without all the complaints and pitfalls so often associated with working in groups or participating in meetings. It’s a tall order! For every time a group meets it is a new situation – even if the group has met many times before; individually, time has passed since they were together so they are different, the group experience therefore always has the potential to be different, new.

I see the present time as important for people to attain success through cooperative efforts within work units, associations, and community groups. Angeles Arriens suggests that this is the dawning of a new “age of cooperation and collective action”.<sup>1</sup> She sees the end of an “age of individuation” and we will now more and more focus our efforts on learning how to work co-operatively.

I recently saw an interesting definition of cooperation in a game called “Heart and Soul Virtue Cards” - “Cooperation is a power. It comes when you have love for both the task and the special part you have to play in bringing it to completion. To cooperate balance solitude and sociability”.<sup>22</sup> This balance is true for the individual members as well as the group – some time for quiet contemplation must be matched with well-planned interaction with others who share responsibility for a common task. In facilitating the overall group process – some time is needed for the group to work together quietly and sometimes they require more structured active engagement on their group task.

In this article I will describe selected elements of the facilitators’ role key in helping groups do what they set out to do.

I will include hints related to responsibility for outcomes, generic group processes, and life phases of groups – before the group meets, during the meeting and afterwards.

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<sup>1</sup> Angeles Arriens – The Second Half of Life, an Audio Collection

<sup>2</sup>Heart and Soul Virtue Cards – Brahma Kumaris World Spiritual Organization

## **Responsibility for Goals and Outcomes**

To ensure a group is taking responsibility for its task, facilitators must be willing to let go of their own hopes and preconceived notions of outcomes.

Although our role is to help make the task and process of the group easy to accomplish, there are many internal and external factors that can hinder the process over which we have no control. Our job in preparation is to become aware of the supporting and constraining forces, so as to plan realistically with the group what is possible.

Too often groups set up unrealistic goals for themselves only to be mired in the reality of their circumstances. Setting realistic goals is based on the nature of the task, the number of participants and the time available. Achieving realistic plans provide a feeling of accomplishment and satisfaction that can be motivating for the further steps. For it is their task, not ours, that they will be responsible for after we the facilitators have departed.

## **Benefits of Small Group Facilitation**

Group ownership of the task is essential to build motivation and dedication. Some of the benefits of feeling ownership as a group for collectively accomplishing a task include:

- Synergy – the energy or motivation to work on the task is better or higher than working on the same task in isolation
- Outcomes – the quality of what can be produced is more or better by using the accumulated experiences of many individuals rather than working alone
- Impact/effect – more people can potentially benefit from the work of the group as each one interacts with others outside the group
- Resourcefulness – more resources are available to the group for its task based on the networks of each individual

### **Common Small Group Processes**

The title of this article “Facilitating Small Groups” can be misleading. Judy<sup>3</sup> pointed out “we facilitate a process not the group. Each process is a natural journey for a group who want to work cooperatively and our job is to make sure everyone stays on the path toward completion of the goal or aim. As facilitators we are guides for the journey/process.”

She identified five common processes in facilitation work. The processes include:

- Problem-solving
- Decision-making
- Planning
- Team or community building

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<sup>3</sup> Judy Johnson, People Development Ltd. Is one of three professional facilitators I consulted for this article. Lynn Irlam, People Development, and David Fletcher, Holistic Community Pursuits, both of whom I met at the Tatamagouche Centre, are also quoted.

- Learning

Each facilitator would be wise to adopt a model and process in each of these areas that they can call upon when the need arises. Early in developing my facilitation skills, I recall a motto from effective instruction that said “80% is preparation, 20% is presentation”. These percentages resonated well when considering good facilitation. Be thorough – get to know about the group and the task. Make a plan to accomplish the task in the time available.

In scuba diving where safety is the key concern, we live by the rule “Plan your dive, and dive your plan”. This slogan applies to facilitation as well. Often groups become distracted on their journey by a nice side trip (a new member, new information, new dynamic, etc.). They do not use their time wisely on their task, leaving them feeling frustrated. Our job as facilitators is to assist them to stay on track or choose their side trips wisely.

### **Typical Flow for Facilitating Small Groups**

There are some basic building blocks that increase the likelihood of successful experiences for the facilitator and the group when they meet. The basic activities of a meeting around which a facilitator will plan include:

- Start-up activities – include welcome, stated purpose and agenda, introductions by each group member, developing guidelines for working together
- Content activities – given what the group wishes to accomplish, the facilitator should arrange a sequence of activities and discussions that will provide the necessary input from the group members. These should vary in format and approach. Variation in formats can include working alone, with a partner, in triads, groups of 4-6. Activities that demand active participation in the group include word associations, brainstorming, case studies, dialogue, stretching exercises, forced choice, games, hopes and fears, personality inventories, joy and laughter, kaleidoscopes, interactive lectures, model building and demonstrations, next steps planning activities, opinion sharing, presentations, quizzes, reality practice, composing songs, task worksheets, universal dances, video-taping group interactions, inspirational walks, and x, y, z!
- Closure – this includes time to evaluate the meeting, share learnings and appreciation and say good-bye until next time.

### **Facilitator Tasks - Before, During and After a Small Group Meets**

In getting ready to facilitate small group process, the facilitator will be required to perform tasks before the group meets, while the meeting is taking place and after the group has completed its goal. Some practical hints in each of these phases are described below.

#### **a. Before the group meets**

Before facilitating a small group meeting, find out as much as possible about the group (who will be attending), the task they have taken on, and then generate ideas for a suitable process (how they can achieve this aim, what steps/activities). I refer to this as the 3 P’s of planning for small group facilitation. Here is a chart for this purpose:

<i>Participants</i> – how many, do they know each other, number of women/men, etc.?	<i>Purpose</i> of the meeting – what is the aim/goal, what do they hope to accomplish by the end of the meeting.	<i>Process</i> – ideas about how the group will achieve its goal, what activities/steps in the process based on nature of the task.
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It is important as a facilitator to know beforehand why a group is getting together and what they hope to accomplish. This information will help to select an appropriate process – is it a learning time, a time to make some decisions as a group, a time to heal old wounds and move on (team building). Ask questions and learn as much as you can from the organizers and the participants. From this information, draft a succinct purpose/aim statement for the meeting.

Once the purpose is clear, brainstorm ways for the group to attain its aim. Then arrange these activities in a logical sequence toward reaching the goal. Think it through and guesstimate how long each activity will take. Discern beforehand what is possible in the time available and what resources are required.

Right before the program starts make sure the highlights of the goal and agenda are posted on a flipchart in a place visible for the whole group to see. This posted purpose and agenda will become the map of the journey the group is on together. For facilitators and group members alike this goal and agenda poster is often a lifesaver in the unknown waters of new group formation.<sup>4</sup>

### **b. During the Small Group Meeting**

Given you know about the participants and their purpose in getting together, David says it is extremely useful within the first 10% of the total time together to have each person say something. This action helps each participant find their voice in the group. These short, sweet activities are known as climate setters, icebreakers and warm-ups. As a starting place, I first refer to the goal and agenda of the group and then ask each person to introduce himself or herself briefly with name and one reason they are happy to be part of this meeting (for example). A start-up activity can relate directly to the task at hand or generate information about group members lives outside the group as an awareness raising function.

Quiet time is also an important part of small group facilitation. Starting group sessions with 2-5 minutes silence for participants to collect their thoughts, feelings, let go of their busyness outside the meeting can be helpful to launch any group process. Silence is also useful when reflecting, giving appreciation, connecting to our source of creativity and in letting a new thought or action settle in. Quiet time can refresh a group and help them get back on track.

When participants get off track, it is often for a good reason and we, as facilitators need to honour this. I recall once when I was facilitating a learning group, I had presented a theory piece on the Education and Program Design model of the Tatamagouche Centre.<sup>4</sup> The group reacted strongly to the deficiency orientation of the first step, needs assessment. They wanted the model to recognize

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<sup>4</sup> The Tatamagouche Education and Design Model (TED) lays out a design sequence of needs assessment, experience, reflection (includes identify and analyse, generalise), application and evaluation.

the strengths and talents inherent in every group. We revised the model to start with a situational assessment of strengths and needs. Once the model had been adapted it seemed time to move on. Not everyone was able to do this; some wanted to discuss the change further. These "individual needs" can support or hinder the productivity of a group. It is described in the MIT theory that every group is brought together because it has a job to do and must be aware of the non-task elements that help or hinder their productivity. To ensure the task gets accomplished in an effective way, the group must also take its maintenance activities and the interests of individual members into consideration. These three functions taken together – maintenance, task and individual roles – can enhance the productivity of the group. The interplay between the three functions is much like that of a tricycle – it can only move forward when all three wheels are in place and functioning properly.<sup>5</sup>

A favourite question to keep a group on track is, “is this something this group wants to spend time on right now?” Sometimes group members head off in very meaningful and interesting discussions that can take them off their originally stated goal and agenda. If this happens check in with the group – all members – “is this what you want to focus on right now given your goal and the time we have together?” Check-in. Remind the group of its commitments and generate information about the consequences of going in the new direction – how will it assist them to complete their task. And it’s OK if they choose to go there. Alter your plan to match the new process. Take the time you, as the facilitator, need to do this.

### **Time management**

Time is a human construct. Most groups thank me for keeping them on track/topic so they can accomplish what they set out to do in the time available and feel the rewards/satisfaction of that. A functional time orientation comes from a shared understanding of the purpose/aim and a group agreement to the established times to complete the proposed steps of the task. Of course each activity can take more or less time. For example in a decision-making process if not all the information is available it is wise to postpone or delay and put in place a plan and timeframe to get that information before proceeding. In recent years as people become busier and take on more roles, there is wisdom in the guidelines set out by Harrison Owen in his model of “Open Space Technology.” These guidelines seem to work for any group facilitation situation to keep a group moving and on target. These simple guidelines are:

- When it starts is the right time
- Whoever comes is the right people
- Whatever happens is the only thing that could have
- When it’s over it’s over!

It is courtesy to start as scheduled. I no longer wait past the agreed upon starting time for latecomers (including VIPs). Instead we get started on time and integrate delayed participants as we go along. Wait for natural breaks and have everyone share their name again and some view of what has happened so far to help acquaint the newcomer with the people and the process. This tactic helps build the group as well as summarize the group process to that point.

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<sup>5</sup> One model of group development describes the common phases of group life to be “forming, norming, storming, performing, and reforming”. There are others including Scott Peck’s community building model.

Breaks are very important in group facilitation. Breaks can vary in nature. They can be physical, visual or content-oriented, size of group etc. They are the natural times to break for a snack or a toilet visit. Honor these. Breaks can also be out of the large group into smaller group to increase individual responsibility for participation and contributions to the group task.

The large group (all participants) format is useful for summarizing, introducing and hearing new information. Talking to your neighbour in the group or in a small group of three or four helps to change the level of participation for everyone. There are numerous occasions when I have heard group members say things like: “Do we have to move into small groups again? Can’t we just stay as one big group to discuss this?” On the odd occasion this may be appropriate but very often the need for individual preparation or reflection then one-to-one or small groupings like dyads or triads is necessary to prepare people to participate in a large group discussion.

Having visual breaks are also stimulating. Having diagrams and flowcharts/step models of a process or the outputs of a group can help them move along on their own with less direct group facilitation. The visual direction can be posted on one flipchart at the front of the group so everyone has their eyes focused on the same process and outputs followed by a handout for the small group. The small group can nominate a facilitator and recorder to help make sure they stay on task and responsible to each other for their outputs.

Each group deserves our unconditional respect and love. This is the spiritual side of all small group facilitation. It is required that the facilitator must envision success for the group even before meeting them. As Judy said, “even if it’s my first meeting and I haven’t met the participants, I make time to imagine them successfully completing their task”. Our focus as facilitators is on knowing the task and a process for helping the group arrive at its own conclusions/ destination.

Lynn advises that it helps everyone to clarify roles at the beginning of any meeting – what are the expectations of the facilitator’s role compared to that of participants. We often ask these three questions early in the life of a group:

- What are your expectations of yourself?
- What are your expectations of other group members?
- What are your expectations of the group facilitator?

Discussions about these three questions will help establish realistic perceptions of your role as a facilitator and increase the likelihood of group ownership for the task. Have individuals answer these three questions. Ask them to share their thoughts in small groups of three or four and prioritize two or three key expectations for the different roles. This activity will lead to a series of statements that can be compared to arrive at a mutual understanding of the facilitator as process guide and participants as owners and contributors to the task.

As an example some groups may plan to be together over a series of 10 evenings in a season to learn something new. Mutually agreed-upon statements of roles could be posted and used as a reference throughout the life of the group. Lynn reminded that we should “Check in on group agreements regularly to ensure smooth functioning for facilitator and group and make sure the posted agreements are not just pretty wallpaper!”

Creativity is important in groups. David would say it is essential. “Action, color, sound – all are ways people express themselves. If a facilitator models freeing up different modalities for interaction and expression, people will then be able to do much more than they normally expect of themselves. Drawing and sculpture forces participants along different paths than the rational/logical self will allow. Popular theatre can be a good resource for facilitators working with community groups to address issues using the “whole person” – feelings, intellect, body, spirit and backgrounds.

Also, asking groups to draw pictures and diagrams as a way of contributing to their collective knowledge helps release child-like play into the group. It helps bring less verbal participants into the discussion and makes the thinking more holistic. These benefits are especially true if the group is planning or solving a problem. Individual or group drawings can give substance to hopes and dreams. A higher, richer level of description will result. The facilitator’s enthusiasm for creativity is also needed. Always connect with your own value and enjoyment of creative expression when asking a group to use theirs.

### **c. Closing a group experience**

For every group meeting it is best to leave another 10% of the time together to close the meeting. David uses his personally developed GLACE model to prompt planning for meaningful closure. This model includes attention to:

- Good-byes
- Learnings/Insights/Lessons
- Appreciations
- Commitments
- Evaluation

In working with AIDS groups in Atlantic Canada I was struck by the rigor with which they brought closure to all our meetings. Nothing was left unsaid. Someone would open the final feedback session with, “OK, now that the meeting is over, what feedback do you have for Debbie about how the meeting was facilitated?” This question helped us identify what worked and what didn’t and how we could improve next time. I always appreciated this structure as an opportunity to learn more about our collective process and in case we were not to meet again, everything that needed to be said was said.

Remember Harrison Owens’ statement “when it’s over it’s over!” Once a group has completed its task (or the agreed upon amount of time is up) and the necessary closure has happened, allow the group to leave. It is important to have closure and move on. If there is more for the group to do, negotiate the new task and time. As a useful future document s facilitator may prepare a short report on what happened – what the purpose of the meeting was, who took part, and what was accomplished. Feedback from the group can also be included along with any plans for future meetings.

### **Endnote**

Often people who want to improve their facilitation skills identify problem behaviors displayed by participants and they want to learn how to deal with these unhelpful behaviors so that they no longer hinder the group. I hesitate to spend time thinking about what to do when things go wrong in a group. I believe if we do a thorough job in our preparations and planning, we greatly increase the

likelihood that people will stay on track in the group. Your own enthusiasm for knowing the task and the process and your confidence that the group will be effective in achieving this task is highly infectious. Doubt about whether participants can do it or that they can work together can have self-fulfilling prophecy tendencies and also be highly contagious. Be enthusiastic for the task and the group's capacity to collectively achieve its aim!