

# FACILITATION TOOLS<sup>i</sup>

Described below are a number of facilitation tools that can be adapted and used in many situations. The tools are grouped in different categories, but almost all the tools can be adapted to be used in the other categories - just be clear about your intentions.

## A. Introductions and Experience Sharing

In any kind of a training or facilitation session it is essential to begin by setting up the group and getting to know group members' own experience.

### Getting to know you, trust, and team building activities

Fun warm-up activities to start the group and set a good atmosphere for working together are an essential part of any facilitation experience. Verbal activities are good and so are physical ones – remember people have multiple intelligences and different learning styles. The activity doesn't have to be tied to the topic area or have a particular point. Just having fun together gets all parts of the brain working more effectively, and helps transform a group of people into a team that can learn and work together cooperatively.

### Rounds

At the beginning, the middle and the end of a meeting, go around the group and ask for each member's comment or contribution. People can pass if they have nothing to say, but a round ensures everyone has an opportunity to speak.

### Appreciative interviews

Spending time in pairs or trios to learn about what deeply matters to each one is a great opportunity for mutual learning. Introduce yourselves and decide who will be the first interviewer. Be sure to share the time equally. The interviewer then asks his/her partner questions such as:

1. What are you passionate about in your work?
2. What do you find most challenging in your work?
3. What is happening in the world that encourages you?

After half of the allotted time, switch so that the first interviewer now gets interviewed. Before you finish remember to thank the other person for sharing.

### Warm-ups or energizers

Good warm-ups meet the following criteria:

- they are not shorter than five minutes and not longer than twenty minutes;
- they give attendees a chance to actively participate by either performing a task, solving a problem, answering a question, or discussing an issue; and
- they are creative and not repetitious.

The length of a warm-up depends upon the length of the meeting/workshop/ training session. If the session is going to last an hour, the warm-up should be about five to ten minutes in length. If

the session is going to last several hours, the warm-up can last as long as twenty minutes and will help to set the mood for the day.

A good warm-up is “participant centered,” not leader centered. If the session leader talks about the topic and the participants listen, it becomes a lecture -- not a warm-up! The warm-up must involve everyone with an activity that causes them to think, move, talk and interact.

Originality and creativity add spice to warm-ups. The best warm-ups are ideas, activities, games, etc., that have never been tried before. By assessing your group, you will be able to understand its needs and its limitations. Once you have a clear picture of the group, it is not difficult to develop a warm-up that is targeted to the group and appropriate for the content of the session.

Common themes for “warm-ups” include: building community, fostering partnerships, creativity, change, and energizers needed to stimulate and shift a group to a new topic or a new dynamic.

## **B. Information Gathering and Research**

During training sessions it is important to give individuals the opportunity to draw on various sources to enhance their learning. Sharing individual experience is an ideal place to start an inquiry, but it is also useful to draw on other sources. Some of the ways you can do this are:

### **Story Telling**

Telling stories can sometimes be challenging in terms of capturing enough detail to make the story interesting, but not putting in so much information that it takes away from the key features of the experience you are attempting to share. The best way to find the proper mix is by preparing before you tell the story. Be clear in describing the scene, outlining the chronology of events and emphasizing key actions or turning points. Ensure you cover the who, what, where, when, and how issues. The why issue may or may not be included in the description of the story, but you must discuss it later on. Try and limit the length of the story so people get the flavour and the point of the story, but that it does not go on too long. Use repetition to emphasize key points or feelings. Following the descriptive telling of the story, you must ask yourself the questions – why do you think this happened?; So, what have we learned from the experience?; and Now, what can we do about it?

Sometimes in preparing for story telling it is helpful to capture the essence of the story with one of the following tools.

- **Drawing**  
Make a simple drawing that captures the location and the flow of the story. Use this drawing to focus yourself and others on the key points of the story.
- **Similes or metaphors**  
Try to use a simile or metaphor to serve as an outline of the story. For example, thinking of your life as a river helps you to focus on the twists and turns in your life, the calm pools, the

easy flowing areas, the rocks you may have bumped up against or even the waterfalls you may have gone over! You can then share your story according to this metaphor. Or maybe your educational experience was like the growing of a flower – starting from a small seed, being watered with reading and films, getting sun in the form of knowledge and provocative questions from facilitators and lecturers, all within the rich soil of an environment with experienced participants from many countries.

- **Objects or symbols**

Choose one physical object or symbol to capture the most significant element of the story. Introduce the object and then describe why the story reminded you of that or clearly show the place of that object within the story. Tell the story around the object and then when you are finished remind people of the object or symbol again.

### **Interview**

Interview peers in your area, program staff or other key informants. It is good to have a short number of specific questions to ask people you are going to interview and either arrange to meet them face to face or contact them by telephone. Be clear in your introduction of yourself, what the overall inquiry is about, why you've chosen to speak to them, and how long they can expect the interview will take. You'll probably want to tell people the interview will be confidential – that nobody will be told that they were the ones that shared specific points. Be clear in taking notes from the interview so you will be able to pull out the key points to share with the rest of your group. Remember to thank people when the interview is over.

### **Literature review (books, articles, websites)**

The most important thing to remember when you take and share information that another person has produced is that you give credit to that person. Whether it is an article, a book or a web site that you have read it must be correctly referenced with the author's name and the date. Without this information it is not legitimate! After reading the piece you should try and write down the three to seven main points the author makes, try and capture in a cartoon or a diagram the author's major argument, and select one or two quotes that convey key ideas. Don't try and share everything you learned from an article – if it is that good tell your colleagues to read the article themselves! Most importantly you should be able to explain why you particularly liked the article, why you found it insightful and useful for your work, and/or which things you found confusing or did not agree with. You should also think about any bias that may exist because of the source of the article – for example will a mining company provide full details of their environmental record if they are trying to get approval to open a new mine?

### **Films**

Documentary films are one of the most powerful, and least utilized, knowledge resources. The Coady library, for example, has a large selection of films on almost every topic, and these days there are more and more resources available on-line on sites such as youtube.com and globalonenessproject.org. You can watch films collectively or individually and then pick out the significant learnings from the film. It is always useful to articulate some questions before you watch the film and then pay close attention to see how the film makers address those questions. At the same time be open to surprises and major insights the film makers might provide that you would not

have considered in advance. Watching and analyzing films are a legitimate way to gather information. Don't forget this valuable resource.

### **Reflections**

Personal or group reflections are another excellent method of research and information gathering. Ask participants challenging questions to reflect on their experiences or spend quiet time individually to do reflective journal writing and then just share those points that one feels comfortable talking about. Some questions to consider might be:

- What happened? Inside me and with others?
- What was my reaction?
- How could I have reacted differently?
- What might have been the outcome if I had reacted differently?
- What could I do in the future that helps me create these preferred outcomes?

## **C. Report Backs on Information Gathering and Research**

In workshops and facilitation sessions people often have had a significant experience or have read or learned some inspiring information related to what is being discussed that they want to share. Sharing everything is impossible! Each person has their own perspectives and interests so it is better to choose priorities and key issues to share, and to encourage participants to describe why those points are significant. Often forcing participants to choose two or three key issues and describe why they are most significant is the most useful. Some ways to help capture and report back significant issues are:

### **Newspaper headline**

Get people to report back with one sentence or phrase as if it were a newspaper headline. This is challenging to put everything in one phrase, but it will force them to think about what is most important and then others can ask questions. It is much better than relating back almost verbatim everything one reads.

### **Single flip-chart/poster**

Groups can agree that everybody will present the information they gathered on only one flip chart, and that it will be clear and concise so everyone can read it. Again this is particularly useful to get participants to focus on their major learnings and reflections before they try and share it with others. This helps deepen the analysis. If people need more explanation they will ask. Similarly individuals could do a poster to feedback information (see Presenting Learnings Back to the Large Group, below).

### **Mock audio or video sound bite**

Select someone in the group to be a radio or TV interviewer. You know these people don't usually let people speak for a long time, but are just looking for short "sound bites". Let this person then go around and interview all the group members quickly about what they have been learning from their information gathering. Others should listen and try and capture the key issues that come up in the

radio or TV interviews. It is a quick way to gather together priority issues. You can have more discussion afterwards on the points raised as a group if you choose to do so.

### **Theme reporting**

Another method if all members of a group have information to report back on one topic is theme reporting. One person starts by sharing one key point from their information gathering. Others confirm if they learned a similar point, and if they can add anything to make the analysis deeper – then a different person offers another point and you check in again to see if others confirm this point and can add anything to it. You continue until all the major points from the different information sources are shared. In this way you find if different sources agree, or where there are differences. Someone needs to facilitate to help you move through this sharing quickly, but it is better than the first person who shares giving all of their points and using up more than their portion of group time leaving other people with little or no time for their turn at the end. Divide time accordingly to the number of group members and leave 10-15 minutes for further discussion.

## **D. Analysis, Synthesis and Generating Insights**

### **Pros and cons**

It is very useful in any discussion to ask for the pros and cons, the advantages and disadvantages or the strengths and weaknesses. It is important to ensure that both sides of the issue are explored so people do not just jump to a conclusion. Divide a flip chart page down the middle and generate pros on one side and cons down the other. Then discuss further.

### **Problem tree**

Draw a tree. Think about the roots as the underlying cause of the issue, the trunk and the branches as the symptoms and the leaves and fruit as the effects of the problem situation.

### **Card sort**

Give everyone in the group small cards to write on. Ask an open-ended question to the whole group and tell each member to write one answer on each card e.g. “from all the information you have gathered what are the most important factors that lead to the high drop-out rate of girls in school?” If they have more than one answer they should write each answer on a separate card, e.g. four answers four separate cards. Remind people to write clearly in large letters so it will be easy for others to read. After people have written their individual answers you can spread all the cards together on a table or post them on the wall and sort the cards into categories. It is good to do this initially in silence without any discussion until the categories begin to emerge from all the cards. Then you can open up the discussion and use another colour of cards to name the categories as appropriate.

### **Sociogram/continuum**

Often things are not clearly one thing or another, like night and day, but there are more subtleties in understanding. Sociograms or continuums can be useful in getting people to consider the many shades of a situation or the levels of intensity. Ask for people’s opinion on a topic or issue by asking them to take a stand on a line that asks them to stand on one end if they completely agree, stand at the other end if they disagree, or place themselves somewhere in the middle. Discuss the diversity of perspectives without trying to convince anyone.

### **Fish bowl**

A "fish bowl" is one way to engage the whole group. It is especially useful when emotions are heated or when participants bring vastly different perceptions to a topic.

Invite five to seven participants to begin the discussion. Ask them to make a circle with their chairs in the middle of the room. Try to ensure that this group reflects diverse points of view on the issue. Ask everyone else to make a circle of chairs around the fish bowl (so you will have a smaller circle within a larger circle). Only people in the fish bowl can speak; thus the process facilitates a kind of sustained, focused listening.

Begin by asking a question and inviting students in the fish bowl to speak to it in a "go-around". Each student in the fish bowl speaks to the question without being interrupted. Then designate a specific amount of time for clarifying questions and further comments from students in the fish bowl.

After 15 minutes or so, invite participants from the larger circle to participate in the fish bowl by tapping a fish bowl participant on the shoulder and moving into that participant's seat. Continue this same procedure with additional questions.

## **E. Presenting Learnings - Back to the Large Group**

### **Poster**

Make a poster that captures some of the key points and critical questions raised about your topic. The poster should have a clear title, some kind of a drawing or graphic that helps illustrate the ideas you want to share, and a limited number of key points in bullet form. Use color and creativity to make the poster attractive!

### **Sociodrama**

A socio-drama is a creative way to capture the essence of a topic or a discussion by presenting it in a story or dramatic form that maintains people's interest. Sociodramas are best when they succinctly show us a situation with the key players, the conditions leading up to the main point, clearly gives us the main point, then asks us what we would do in such a situation or develops a solution for us to consider.

### **Lecturette**

A lecturette is a short lecture, usually 10 – 20 minutes in length. Much like the poster make it clear with a beginning, middle and closing. The beginning: introduce the topic and why your group was interested. The middle: develop three-five main points from your group's research. Illustrate these points with practical examples. The end: summarize what you have said and leave the group with something to think about.

## F. Decision Making and Time Management

### Random choice

Groups can waste a lot of time deciding who will go first, who will chair a session, who will be the recorder, etcetera. Use random choice! Make slips of paper with the number 1 – 7 (assuming there are seven in your group). Fold the papers, state you will go in order according to the number people choose, or that whoever gets #1 will chair, or whoever gets #2 will be the recorder, etcetera. Then everybody picks a piece of paper. Don't waste time on these simple decisions. Just do it!

### Stacking – or speakers list

Someone in the group needs to take responsibility for seeing who wants to speak on a particular topic (by raising their hands). People should be told (or a list written down) on who is going to speak and in what order. New people are added to the list as they raise their hands. Prior to bringing closure to the discussion the person leading the discussion needs to say “we will only take three more comments on this issue”.

### Straw votes

Straw votes are a simple form of voting (show of hands) to get a sense of where people stand on an issue. The voting is not used for making a decision, but simply to move a discussion process forward. People can be asked who is generally in favour of the idea and who is generally against the idea. Then the discussion can continue with two people from each side stating why they are for or against (it is good to call on people who have not been involved in the discussion up to this point).

### “Talking stick”

Passing a “talking stick” or a sacred object around the circle to facilitate discussion is a powerful tool in First Nations cultures. Usually the sacred object is held in the left hand (the hand and arm closest to the heart) and each person is expected to speak from the heart when they hold the object. Each person can speak for as long as s/he likes when s/he holds the object and then passes the object to the person on her/his left. No one should interrupt or leave the circle while people are talking. Individuals can pass if they do not want to say anything. The object should pass around the circle twice to ensure everyone has an opportunity to speak. People must honour and respect what is said, listen to others, and respect the time that is needed to hear from everyone. Other ways of passing an object around the circle can also facilitate discussion, but we should be careful about honouring the culture from which a method is taken.

### Matchsticks or penny equalizer

At the beginning of a discussion give each person a number of objects (eg. five pennies). As the discussion begins let people know every time they make a statement they will have to deposit one of their pennies in the centre of the table. When their pennies are gone they will have to stop contributing to the discussion. This ensures that everyone has an equal opportunity to participate and the discussions are not dominated by one or two people.



**Martha's rules of order:**

1. Discuss the issue
2. Suggest a specific proposal
3. Get a show of hands on:
  - a. who likes the proposal;
  - b. who can live with the proposal; and
  - c. who is uncomfortable with the proposal?
4. If no one is uncomfortable, implement the proposal
5. If someone is uncomfortable, state why and discuss
6. Then vote on the question: should we implement this decision over the stated objections of the minority, when a majority of people think it is workable?
  - a. YES - means majority rules
  - b. NO - means postponing the decision until there is time to work on consensus

**Robert's generic rules of order:**

1. Proposal is moved by one member of the group
2. Proposal must be seconded by another member
3. Chairperson calls for discussion on the proposal: chair needs to ensure everyone who wants to speak on the issues has the opportunity to do so. Chair also needs to limit discussion to a specified period of time and should set this in advance)
4. Chairperson calls a vote:
  - a. those in favour;
  - b. those opposed; and
  - c. those abstained.
5. If majority vote in favour, group goes ahead with proposal

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