

CURIOSITY  
SOCIETY

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# A FACILITATOR'S HANDBOOK

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# Introduction

**Facilitation can enable us to have better gatherings and make the most of the collective wisdom of a group.**

For **Active Gloucestershire**, facilitation is particularly important in catalysing the social movement, **we can move**. Well-facilitated gatherings can enable schools, employers, religious organisations, neighbourhood groups, social clubs and charities to come together as more than the sum of their parts to increase levels of physical activity across Gloucestershire.

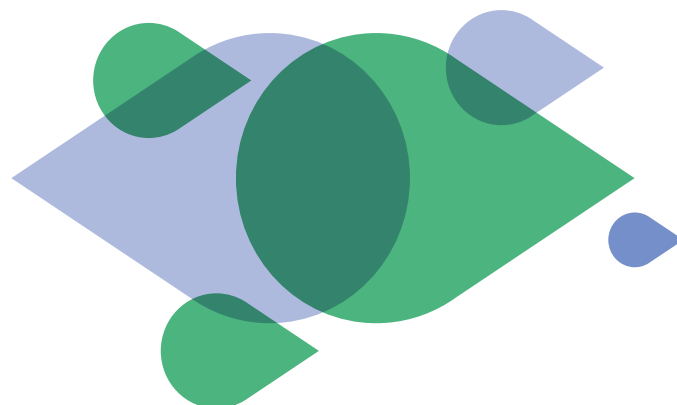
The handbook builds on a pair of workshops with the Active Gloucestershire team led by the **Curiosity Society** in early 2021. Thank you to everyone who took part.

## Summary

The ability to facilitate starts with understanding the role of the facilitator and the facilitator's mindset. The next ingredient is having a clear purpose for a meeting or gathering. This purpose will guide the facilitator's choices of venue, who to invite, and how they facilitate. The amount of structure, how decisions are made and how a meeting is recorded are all important decisions that should be made with intention.

The structure of the meeting is likely to follow a pattern of opening, exploring and closing. Understanding this 'diamond of participation' and planning for each stage helps a facilitator to ensure a group shares a lot of diverse ideas, can have room for disagreement and improving the ideas, and can make choices between them, with clear next steps. With a clear purpose and structure, it becomes easier to select and adapt activities.

All of these principles and techniques apply to virtual facilitation as well as in-person. In fact, making intentional decisions ahead of a meeting becomes more important when it is more difficult to adjust on the go. There are additional considerations to take into account such as extra planning, using technology and working with a tech host or co-facilitator.



Finally, facilitation is a skill that can be practised and learnt over time. This is more than having a few more activities under your belt. You might practise asking better questions, giving clear instructions or even trying your hand at improvisation. Finding opportunities to try things out and get feedback helps a lot.

## How to navigate and use this handbook

You are very welcome to read this handbook from front-to-back, but you can also dip into each section for your particular needs. Even if you are a more experienced facilitator, you might be tempted to skip over the Principles of Facilitation section. However, you might find this section helps you understand your facilitation practice in a new light.

## Using supporting links

Clickable links to related pages and supporting online content are available throughout this handbook. For those using non-digital handbooks, an appendix of URL links are provided on [page 23](#).

# Principles of facilitation

## The role of the facilitator

**"We use "facilitation" to describe a style of engaging others toward a goal. We generally assume that goal is learning, which we use in the broadest of ways: learning content knowledge, learning about oneself and others, or unlearning (our favorite type of learning). [...] The facilitator is the person responsible for guiding the learning process."**

*Unlocking the Magic of Facilitation,*  
Sam Killermann and Meg Bolger

**"A facilitator is someone trained in the skill of shaping group dynamics and collective conversations."**

*The Art of Gathering*  
Priya Parker

Facilitation can involve a wide range of activities – from fun games to emotional conversations. At its heart, facilitation is about good 'process' – providing a structure and environment which allow something new to emerge. It can help take a mess of ideas and people to some kind of conclusion in the form of plans and improved ideas.

A facilitator in the purest sense will be neutral to the outcome of a meeting. They instead focus on creating an environment in which people are comfortable sharing, there is balance in who speaks, they ask questions that move the conversation along, keep track of time and make adjustments to the plan as they read the energy of the room and the changing needs of the group.

An assumption behind facilitation is that the wisdom of the group is greater than the wisdom of any individual. By having someone to look after the process, attendees can fully immerse themselves in participating, contributing more of their experience and expertise. Done well, this leads to a better, more creative outcome which has the support of more of the group and leads to better relationships amongst the group.

However, in practice, facilitators are almost never completely neutral. As well as having their own social and psychological biases, a facilitator may bring content expertise, might have leadership responsibilities or may have called the meeting with a clear sense of what they want to get out of it.

In this case, rather than pretending to be neutral, the facilitator should acknowledge the multiple 'hats' they are wearing and, perhaps, naming the biases they might have. For example, if there is an agenda item where they have subject expertise, they might wear the 'expert hat' for that part, asking someone else to facilitate that section. Similarly, a leader might ask for someone else to facilitate if there is an issue they are particularly invested in.

**"The facilitative leader role is the most difficult facilitative role to fill because you need to use facilitative skills at the same time you're deeply involved in the content of the conversation and the decision-making process. [...] And the more you're involved in the content and the stronger your views on the content are, the more difficult it is to be curious about others' views and ask others to identify any gaps or problems in your reasoning."**

*The Skilled Facilitator,*  
Roger Schwarz

One risk of trying to wear multiple hats at the same time is what can be called 'facipulation' – a portmanteau of facilitation and manipulation. In this scenario, the so-called facilitator has a very clear outcome in mind for the conversation and guides the conversation to that conclusion. This is one sure-fire way to lose trust in the idea of facilitation!

**"Be selective about when you share your opinion or experiences. Your opinion will often create a climate where the "neutral" is similar to you, disproportionate to other people's sharing. Know your voice carries this weight every time you decide to weigh in."**

*Unlocking the Magic of Facilitation,*  
Sam Killermann and Meg Bolger

## The facilitator's mindset

In *The Skilled Facilitator*, Roger Schwarz claims that “the most challenging part of facilitation is not the group – it's your mindset and how the group affects it”. He advocates for operating in the ‘mutual learning mindset’:

**“The mutual learning mindset comprises the core values of transparency, curiosity, informed choice, accountability, and compassion. When you operate from the mutual learning mindset, rather than assuming you understand and are right while others who disagree don't understand and are wrong, you assume that each of us is missing information and that the differences are opportunities for learning. You recognise that you may be contributing to the very problems you're complaining about.”**

*The Skilled Facilitator*  
Roger Schwarz

While many of us might operate out of this mindset when we're at our best, it's when we are challenged, triggered and tired that it is most difficult to maintain this. This is also the most important time to be in this mindset.

In situations where you find yourself getting worked up, it can be helpful to pause for a moment to recognise this, take a breath and return again to being curious, open and humble. It's not easy to do this, but it can help the rest of the group a great deal and get things back on track.

**“Listening is key to all good communication. The problem is that we think we are great listeners until we hear something that isn't consistent with our current thinking. Then we become tense, contracted, and defensive, and the conversation fails to expand into new territory.”**

*Compassionate Conversations*  
Diane Musho Hamilton, Gabriel Menegale Wilson, and Kimberly Myosai Loh

## Planning, purpose, place and people

### Planning

It is sometimes possible to facilitate a group to a great outcome on the fly. However, for most of us, most of the time, the meeting will go a lot better if we think about the purpose, the structure, the tone, the technology and more, well ahead of time.

It can take much longer than the duration of the meeting to prepare for it – especially if the brief changes, the meeting is remote and there are multiple facilitators. While this might feel inefficient, a badly-run meeting is a much worse waste of time when you consider the number of people involved. In fact, it's very easy for a meeting to make things worse rather than better if it confuses or even upsets participants.

In the section on *Virtual Tips and Tools* there is a sample session planning table you can use to capture your plan.

### Purpose

**“The first step in convening people meaningfully: committing to a bold, sharp purpose.**

[...]

**Make purpose your bouncer. Let it decide what goes into your gathering and what stays out. When in doubt about any element, even the smallest detail, hark back to that purpose and decide in accordance with it.”**

*The Art of Gathering*  
Priya Parker

A purpose is not the same as an agenda. A good purpose will tell you not only what you're trying to achieve, but also what you won't be discussing.

Reviewing the purpose of a gathering is especially important when you're moving online a meeting that normally happens in-person. It may turn out that your meeting means different things to different people. To one colleague it's about hearing updates, to another it's a chance to catch up and connect, to another it's about prioritising next steps.

The best way to figure out the purpose is to ask people ahead of time what they want to get out of the meeting (yup... it's not rocket science!). If they say different things, then you can have a conversation about different ways to meet their needs. Can some of it be done on a shared document or an email update? Do you need another meeting, maybe with a smaller group of people? In what order might you tackle the needs of different people?

If you **think about it as a process of offline and online activities instead of a single event**, you may stumble on a more effective option. It's better to consider this openly than to end up spending a couple of hours satisfying nobody.

One way to get to a more compelling purpose is to keep on asking 'why?'. You can do this five times to get to the root of why a meeting is happening. It might surprise you!

### **Place**

A location can inspire a group to think differently. Are you in a cosy room with cushions and low lighting or an auditorium with stage lighting? Have people had to travel somewhere different? Have you moved the chairs and tables around in your standard meeting room?

**"Switching the configuration of the room can create new energy: swap the seating arrangement (e.g., if you were in a classroom style, change it to an open circle, or small pods) and ask participants to sit by someone new."**

*Unlocking the Magic of Facilitation,*  
Sam Killermann and Meg Bolger

You can be creative with this even when working remotely – ask participants to light a candle, sit somewhere different or even have a different virtual background. You could send a fancy tea bag in the post for everyone to drink together or suggest that they have a walk around the block in the mid-session break.

Try to look after physical needs of the participants. Work with biology, not against it! If you're in person, provide good snacks or meals, choosing refreshments to avoid a sugar crash or a carb-induced post-lunch slump. If you're working virtually, make sure people have had time for refreshments if you're meeting over lunchtime. And either way, don't go too long without a break and encourage people to look after themselves, even if that means stepping out of the meeting for a few minutes.

### **People**

Who needs to be in the meeting? The more people you have, the more difficult it is for everyone to meaningfully contribute. It can help to do some basic meeting arithmetic and multiplying how many people you expect to come by how long you think each of them should contribute (e.g. 12 people speaking for five minutes each is an hour). Of course, in reality, some people will speak for much longer than others. It's no wonder that meetings often run over, with several people still feeling like they didn't have their say.

The rest of this guide will give many ideas for enabling many people to contribute and for this to add up to achieving the purpose of the meeting. However, it's still a good idea to exercise restraint in who is invited. This is especially true for remote meetings where there is a much lower barrier to joining a Zoom videoconference, and it's easy to invite everyone just to be polite.

There are ways around this. Can you record the meeting (or parts of it) to watch back later? Or can you capture it in another way so that those who couldn't attend can quickly understand what was discussed and decided?

When preparing, it's not only the number of people you need to consider but whether there are any difficult dynamics that could surface and the diversity of the group you are assembling. Remember that it is a powerful choice you are making to include or exclude different voices. If you are making the decision to keep a meeting small, consider other ways for the views of a larger group to be heard.

## Decisions to make about how you will facilitate

Facilitators need to be able to make an informed decision on how they will design and facilitate each session. While facilitators tend to have a style they tend towards (e.g. fun and fast, or reflective and deep), it helps to have some range and to be able to adapt to different circumstances.

The section below describes a few design choices to be made ahead of a session.

Another way of doing this is to use Daniel Stillman's *Conversation Design Operating System* canvas.

The nine sections are:

- People and diversity
- Invitation and initiation
- Power and permission
- Turn taking and silence
- Interface and space
- Cadence and rhythm
- Threading and narrative
- Goals and agreements, and
- Error and repair.

There is a **template version of it** you can use for free on *Mural* (an online whiteboard tool).

### Structure

The amount of structure chosen should support the intended purpose and tone of the meeting.

Structure and process can be liberating and allow a group to improvise within boundaries. If you have a process you trust, you can create a safe container for ideas and conversation to flow. This is the whole idea of **Liberating Structures** – that the right kind of structures can invite participation, creativity and wisdom.

Too much structure can be limiting, especially if the facilitator does not adapt it to changing circumstances. On the other hand, not having enough structure can be frustrating. A conversation that feels nice and open but doesn't go anywhere can understandably lead to losing trust in the process. A lack of structure can also mean that the same characters talk more.

### Pace and energy

Choose the pace and level of energy that is appropriate for the purpose of your meeting and the people involved.

Sometimes a slow, reflective discussion with plenty of space for people to express their feelings and perspectives is helpful. Other times, a rapid-fire meeting with time limits and efficient chairing is what the group needs. Indeed, both of these can be useful within the same meeting.

If you have a discussion that needs room to breathe, don't be tempted to cram it into a time box – especially when it is emotionally important. This might feel efficient in the meeting itself, but probably means it won't be dealt with properly and you'll need to revisit it. One way of dealing with this is to pick a part of the larger issue to discuss and make progress on.

The meeting arithmetic (see the section on *People*) of how many people are in the meeting will help you decide how much you need to speed up or slow down. For something like a check-in or sharing back from breakout rooms, it can be helpful to explicitly name how much time there is for the section and how many people will be sharing so that the group can self-regulate.

Consider the energy of the meeting. There is a place for silence – either as a pause to allow people to gather their thoughts or as people are using a virtual whiteboard or typing. This can suit the introverts in the room. A slightly chaotic discussion with post-it notes flying around is more likely to suit extraverts. Try to mix this up in different sections.

How you act and speak will change the level of energy. For instance, if you slow down your speech and talk gently, the rest of the group will probably mirror you.

## Democracy

In a status update meeting, a leader might present what has been happening with a short time for questions at the end. In a freewheeling creative conversation, the process itself might be up for discussion and everyone is able to contribute as much as they want. Most facilitated sessions will be somewhere between these extremes.

A simple way to be more democratic is to ensure people have an equal opportunity to speak. Going round the room (physical or virtual) and taking turns, perhaps timed, is a simple way to do this. One reason a check-in is a powerful tool is that it means that everyone has spoken at the beginning of the meeting. If there are people who tend to dominate meetings, you might need to speak with them ahead of time to suggest that they need to hold back for the good of the group.

Other ways to hear from more voices described later in this handbook include:

- **Breakout groups – it's easier and safer to share in a smaller group**
- **Thinking alone then thinking – give time for people to formulate their thoughts before speaking so it's not only the most confident people jumping in first**
- **Voting – reveal the group's preferences**
- **Checking understanding and reading the room to see who is engaging.**

Also consider what level of agreement you need from the group for a particular decision. Do you need consensus (everyone agreeing) or only consent (nobody has a strong objection)?

Note that the facilitator is part of the power dynamics of a group. A facilitator can act as a kind of benevolent dictator, wielding their power over the process in order for the group to make the most of its expertise and experience. For that reason, it's a good idea to ask permission to facilitate from the group up-front. This includes looking after the process and timing, and sometimes cutting them short for the good of the group. Saying this up-front makes it less awkward when you do need to interrupt.

**“Ask the group check-in questions throughout the workshop. Ask them what they think about things. Ask them how they feel. Ask them to rephrase points you made, or someone else in the room made. Ask them to reflect back on the first half of a workshop aloud. Process the process. Ask them whatever you need to know... just, you know, shut up once you do.”**

*Unlocking the Magic of Facilitation*  
Sam Killermann and Meg Bolger

The dark side of the power of the facilitator is that it's easy to lose track of how the group is doing and fixate on following the process no matter whether it is still useful or not. One way around this is to ask the group at times how they are finding the process. While it is possible to get some impression of how the group is feeling from body language and vocal tone, a simple question like: 'Would you like to continue this discussion or move on?' can reveal the preferences of the group.

## Consider the medium of the conversation

In a normal face-to-face conversation, the medium is air. Sometimes we might write on sticky notes or a whiteboard, which helps us have a common understanding of what ideas are emerging and where we have agreement or disagreement. Often one person will be taking notes that are shared afterwards.

When we're on a teleconference it can be more difficult to track where the conversation is going. The medium lacks nuance. We don't have the visual cues we have in person and it's difficult to jump in and say you're confused. This is one reason that it is helpful for people to turn on their cameras during virtual meetings – it helps everyone to read the room (plus, seeing faces makes humans happy!). It also helps to have norms for hand gestures for showing agreement or disagreement (clapping, thumbs up/down, etc.) or for raising hands for a question.

In a virtual space, we can go further than this by having a shared space to not only record the conversation but to allow contributions from many people in parallel. A simple way to do this is a 'chat wave' in the Zoom chat box (see the section on Check-ins and Check-outs). You could also use a virtual whiteboard such as JamBoard, Mural or Miro, or a simple Google Doc. Just watch out for overwhelming people with multiple applications and windows and be really clear about where people should be looking. Keep it simple.



### ***Capturing and harvesting***

Capturing and harvesting the meeting enables you to have a shared sense of what is happening during the meeting and to remember and share this afterwards. There is a good reason why flip-charts and post-it notes are ubiquitous in in-person workshops: they allow us to make the conversation visible to those present in the room and to have an accurate record that can be photographed, written up and shared afterwards. This ensures that the conversation does not stay in the meeting. This, of course, happens with more conventional meetings in the form of minutes.

If you have been thoughtful about the medium of the conversation, you can make use of this to capture meaning as you go, checking with the group that what you're writing accurately reflects what they're saying. This can be most helpful when they point out how you've missed the point!

**"As you go, ask the team, "Does this look right?" or "How should I capture that?" And when the conversation starts to stall out, you can nudge it to conclusion by saying, "Is there a good way we can capture this thinking and move on?"**

*Sprint*  
Jake Knapp

If you're a visual thinker, you can go beyond written notes to draw diagrams and doodles. Books like Sunni Brown's *Doodle Revolution* can teach you how to do this, and you can quickly get better with practice. You don't need to be an artist for your drawing to help bring out the creativity in a group.

**"A good sketch has just enough information to get an idea across, and no more."**

*Gamestorming*  
Dave Gray, Sunni Brown, and James Macanufo

# Structure

## Before the meeting

**"A colleague in the conflict-resolution field taught me a principle I have never forgotten: 90 percent of what makes a gathering successful is put in place beforehand."**

*The Art of Gathering*  
Priya Parker

Remember to think about how people find out about the meeting, how they are invited, what they read or watch beforehand and how they arrive. Does the meeting have a compelling name? Do you need to have a phone call with each person beforehand to check what they are thinking? Do people get invited in an Identikit email or a hand-written note? Do they look at the pre-reading in a scrambled five minutes before the meeting or at their leisure a few days before? Do they have to look back across 17 emails to find the Zoom link, only to discover that the meeting is on Teams and has a password? All of these things will make a big difference to how they feel, think and act on arrival and therefore how they will contribute.

## The welcome: creating the environment you want

**"Hosts often don't realize that there tends to be unfilled, unseized time between guests' arrival and the formal bell-ringing, glass-clinking, or other form of opening. Make use of this no-man's-land."**

*The Art of Gathering*  
Priya Parker

What will people find when they arrive at the meeting? The default tends to be awkward small talk but we can do better than this! This is your chance to set the tone. There are all manner of things you can do to signal what kind of meeting this will be.

If you want an upbeat start, you might play some lively music. If you're in-person, you might have some tasty snacks on hand (or encourage them to get some in their own home if meeting remotely). To orient people, you might have the agenda written up on a slide or on a wall, perhaps in a visual form like that of a journey. If you're on Zoom, you could put people into breakout rooms straight away to mingle.

Try something different in your next meeting. At the very least it will grab people's attention and mitigate their meeting fatigue!

## The Diamond of Participation

**“Every game is a world which evolves in stages, as follows: imagine the world, create the world, open the world, explore the world, and close the world.”**

*Gamestorming*

Dave Gray, Sunni Brown and James Macanufo

**“Often the worst thing you can do with a difficult question is to try to answer it too quickly. When the mind is coming up with What If possibilities, these fresh, new ideas can take time to percolate and form.”**

*A Beautiful Question*

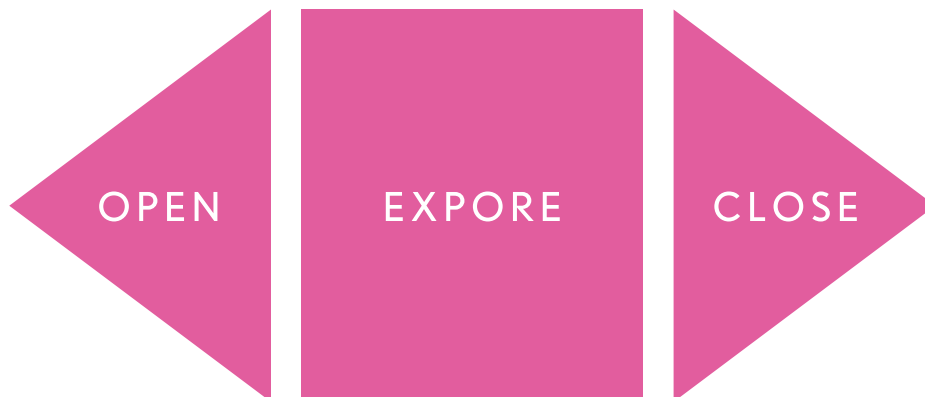
Warren Berger

While excellent meetings come in all shapes and sizes, a common pattern is of opening at the beginning, exploring in the middle and closing at the end. This creates the shape of a hexagon, but is known as the diamond of participation. Opening, exploring and closing is also something known as divergence, emergence and convergence.

Each of the three elements is necessary. If you do not open up to a wide set of perspectives and ideas, you'll be missing out on potential options to choose from later on. If you skip the explore phase, you'll miss the opportunity to have productive disagreements and improve the ideas. Finally, if you open things up, you should make sure to close, otherwise things feel messy and it leaves the issue and next steps unresolved.

When planning a session, think about the balance between opening, exploring and closing. It's likely that you find yourself drawn more to one than the others. Some people love asking big questions to open up conversations. Some enjoy holding the tension of paradoxical ideas. And others like things to be resolved neatly. If you know which of these you are most drawn to, you can regulate yourself and maybe ask for help from someone with complementary skill sets and preferences.

Open, explore and close can work at different scales (sometimes simultaneously). You can use it for a five-minute breakout conversation, for a one hour meeting and for a twelve-month strategic planning process.



*A simple version of the Diamond of Participation*

### **Open / Divergence**

At this stage, you want to ask big questions, generate lots of ideas and look at things in a different way. It can be helpful to have a mix of solo working, pairs and trios, and larger group discussions in order to allow both introverts and extraverts to contribute fully.

**"The keyword for opening is "divergent": you want the widest possible spread of perspectives; you want to populate your world with as many and as diverse a set of ideas as you can."**

*Gamestorming*

Dave Gray, Sunni Brown and James Macanufo

### **Explore / Emergence**

This is the space for courage, disagreement and improving the options you have. As you can see in the diagram, this can be known as the 'groan zone' as it can often be a frustrating experience. As a facilitator, it's your job to hold the group in this zone for longer than they'd probably like, because the pay-off comes in the form of better ideas than actually address the root cause. In this stage, it's especially important to create a healthy environment for disagreement and healthy conflict. If you have agreed how you want to work together at the beginning of the meeting, you might want to revisit this.

**"The keyword for the exploring stage is "emergent": you want to create the conditions that will allow unexpected, surprising, and delightful things to emerge."**

*Gamestorming*

Dave Gray, Sunni Brown and James Macanufo

### **Close / Convergence**

The final stage is for synthesis, decisions, prioritisation and next steps. This might mean finding consensus, checking for a group's consent for what happens next, voting between options or wrapping up with some closing remarks or a check out.

If you're opening up a big, contentious issue, you should plan enough time to resolve it to at least some extent. Closing doesn't have to mean finding consensus - it could just mean identifying the next questions you need to ask or identifying who is responsible for arranging the next conversation.

**"The keyword for the closing act is "convergent": you want to narrow the field in order to select the most promising things for whatever comes next."**

*Gamestorming*

Dave Gray, Sunni Brown and James Macanufo

## The Diamond of Participation



*A more detailed version of the Diamond of Participation.*

# Activities

**There are thousands of activities that a facilitator can choose from, adapt and combine. Many resources are available online.**

This section is therefore not attempting to be comprehensive, but to give a selection of more general activities that can be used in many meetings and workshops.

A variety of ways to engage, how would this group like to engage?

## Check-ins and check-outs

In a typical check-in, the facilitator will give a prompt question and everyone in the group answers in turn. This might be as simple as sharing their name and role, but there are many possibilities.

Check-ins and check-outs are deceptively powerful tools to create more inclusive and productive meetings. Check-ins can help participants to 'arrive' at the meeting, give everyone the chance to speak straight away (even if briefly), help the group to hear everyone and see patterns, and start to get people thinking about the subject matter of the meeting. A check-in is also useful for giving the facilitator an indication of what the group is thinking and feeling, and whether the meeting plan might need to change with this in mind.

As with all parts of a meeting, it helps to have a clear purpose in mind for the check-in when deciding how to run it. This will help with the choice of tone (fun or reflective), length (one word each or five minutes), prompting question (related or unrelated to the agenda), and whether to keep everyone together or put people in pairs or breakout groups.

'Check-in Success' have **a very long list of questions** that can be used for check-ins as well as giving guidance on what, why, when and how.

You can be creative with check-ins. For example, instead of asking people how they are feeling, you can ask people to draw, share a movement or dance move, or an object in the room, or share a metaphor or image. It can help to give everyone 30 seconds to reflect on their answer and write it down before anyone starts sharing. That way, they are not scrambling to come up with a profound answer instead of listening.

An alternative to a whole group check-in is to put people in pairs or trios and ask them to discuss a prompt question. This can give each person longer to speak without the check-in taking longer. It can also help build relationships, especially in a newly forming group. *The Liberating Structure Impromptu Networking* is one way to do this.

Check-outs work on a similar principle at the end of a meeting. Having been through a shared experience, each person can share what they are taking away, what they have learnt or whatever else serves the purpose of closing the gathering. This can also be an opportunity to get feedback on the meeting and for people to commit to next steps. The Fun Retrospectives website has **several creative ideas** for check-out activities.

## Chat waves

One way of doing a check-in or check-out online is a chat wave.

Pose a question to participants and give them less than a minute to write an answer in the chatbox (it could be only a few seconds). Tell them to hold off pressing 'send' until you give the instruction. You'll see a wonderful flurry of messages emerge all at once. You can repeat this with a few questions in a row to make the most of momentum.

A chat wave works especially well at the beginning or end of a session – for example, to get people warmed up or to get feedback. You can see some fascinating patterns emerge. If you were in person, it would be impossible to get input from everyone at once in a way that everyone can go back and review straight afterwards.

## Creating the container

When a group is coming together for the first time, starting a new project or embarking on a more contentious conversation, it can help to identify from the beginning how they would like to work together. This is sometimes known as 'creating the container' for open, honest conversations, or in coaching as 'designing the team alliance'.

Some questions to guide this discussion include:

- How do we want to be together in this space?
- What is the culture / atmosphere you want to create together?
- How do we want to be together when things get difficult?
- What conversation superpowers do you have? What will you take responsibility for?

You can cover these questions one by one and ask people to write on post-its or just name what is top of their mind. The aim is to have a short list of behaviours and principles that the group agrees on and commits to. This should be displayed somewhere the group can see and refer back to throughout the meeting and in future meetings. The facilitator can ask the group at different stages to what extent they see the agreement in action and what might need to change.

## Asking questions

While questions don't quite count as an activity, there is a good reason why many books on facilitation include a section on them. They are an essential part of the facilitator's toolkit. There is a skill to choosing the right question and asking it in a way that has the desired effect, whether that is to help the group to learn, to see more clearly, to open up the conversation, to see things from a different angle or to make a difficult choice.

**"A beautiful question is an ambitious yet actionable question that can begin to shift the way we perceive or think about something—and that might serve as a catalyst to bring about change."**

*A Beautiful Question*  
Warren Berger

**"Ask obvious questions:**

**The Facilitator needs to say "Why?" a lot and ask questions to which everybody already knows the answer. Covering the obvious ensures there's no misinterpretation, and it often draws out important details that not everyone knows about."**

*Sprint*  
Jake Knapp

**"When people are getting too caught up in the details, spark the imagination and bring them up a level with some experimental questions. If they are up in the clouds and need a bit of grounding, bring them down with some examining questions."**

*Gamestorming*  
Dave Gray, Sunni Brown and James Macanuso

One of the most difficult skills to learn is to not answer your own questions! It takes practice to get comfortable with awkward silences and avoid filling the space by talking. A few extra awkward seconds give the group time to think. If you can't hold back, you can ask the question again and wait a bit longer. If you are working remotely, it can help to put the question in the chat box as you ask it.

**"Used after a facilitator asked a question of the group, W.H.A.L.E. (which stood for [...] Wait, Hesitate, Ask [again], Listen, then Explain) was to prevent facilitators from answering their own questions, and subsequently dominating the discussion they were there to lead."**

*Unlocking the Magic of Facilitation*  
Sam Killermann and Meg Bolger

## Thinking alone, thinking together

One of the simplest but most helpful patterns you can help when facilitating is to give people the chance to think alone and think together.

Who speaks first in a group matters. It sets the tone for the rest of a conversation. Even where others disagree, they are still responding to the original idea. When people are given time to think individually before sharing, it becomes less likely that brainstorming is dominated by the typically loud voices who always speak first.

Even better, you can add one or two extra stages between thinking alone and sharing with the whole group. 1-2-4-all is a Liberating Structure where:

- **People reflect individually on a question for one minute**
- **They discuss in pairs for two minutes, building on ideas from self-reflection**
- **They discuss in fours (a pair of pairs) for four minutes, building on the ideas from the pairs, noticing similarities and differences**
- **Each group shares one idea that stood out from their conversation (i.e. not a report back of the whole conversation!). Five minutes is given for this.**

This simple pattern allows for individual and group thinking to be shared with the whole group in just twelve minutes.

This is a bit more fiddly for virtual meetings as it requires manually moving pairs together in breakout rooms, but it's very much possible. One option to simplify is 'think, pair, share', removing the 'fours' stage.

## Question storming

Question storming is a particular form of brainstorming where, instead of ideas, you generate questions together. This can be especially useful in the opening, divergent stage of a meeting. By generating a large number of questions, combining them and choosing which are the most important to answer, or identifying which need to be answered first, you can set an agenda for the rest of a workshop



















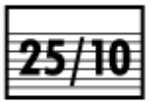










There is no set way of doing this but typically, the facilitator will set a topic and then the participants will have some time to individually come up with a lot of questions about the topic, often on post-it notes. These are then clustered together to reveal common themes and some of the questions are then combined and improved. A final stage might be voting on which questions to answer next, or ordering questions by what stage of a process they might be answered.



## Liberating Structures

*Liberating Structures* are 33 structures for meetings and gatherings that enable high levels of participation, unleash creativity and help a group work towards an outcome. Several of them feature elsewhere in this handbook. They can help with everything from peer learning to crowdsourcing and choosing between ideas. They can last anywhere from ten minutes to multiple days and are designed to work well with each other in a sequence.

They are open source and instructions for each of them are available on the [website](#). They are therefore an excellent way to learn to be a better facilitator.

|   |  |  |   |  |   |   |
|---|--|--|---|--|---|---|
| <p>LS Menu</p>                 | <p>Wicked questions</p>           | <p>What<sup>3</sup> debrief</p>       | <p>Min specs</p>                   | <p>Heard, seen respected</p>     | <p>What I need from you</p>        | <p>Integrated autonomy</p>       |
| <p>Design elements</p>       | <p>Appreciative interviews</p>  | <p>Discovery and action dialog</p>  | <p>Improv prototyping</p>        | <p>Drawing together</p>        | <p>Open space</p>                | <p>Critical uncertainties</p>  |
| <p>1-2-4-All</p>             | <p>TRIZ</p>                     | <p>Shift &amp; share</p>            | <p>Helping heuristics</p>        | <p>Design storyboards</p>      | <p>Generative relationships</p>  | <p>Ecocycle</p>                |
| <p>Impromptu networking</p>  | <p>15% solutions</p>            | <p>25 : 10 crowdsourcing</p>        | <p>Conversation café</p>         | <p>Celebrity interview</p>     | <p>Agree/certainty matrix</p>    | <p>Panarchy</p>                |
| <p>9-whys</p>                | <p>Troika consulting</p>        | <p>Wise crowds</p>                  | <p>User experience fishbowl</p>  | <p>Social network webbing</p>  | <p>Simple ethnography</p>        | <p>Purpose to practice</p>     |

# Virtual tips and tools

Facilitating virtually presents some extra challenges. For example, without the additional visual, bodily and environmental cues, it's harder to pick up on what is unsaid and unasked. And the addition of having to worry about technology means even more multi-tasking.

This means that a good meeting takes more preparation because it's more difficult to adjust on the fly. We have to think through and prepare for multiple scenarios. We need multiple people to facilitate and do technical support.

However, there are also opportunities from more people being able to participate – both due to not having to travel and by being able to share simultaneously through technology.

## Planning for a virtual meeting

As seen in the example table, as well as the normal planning for the timing, content and purpose of each section, we need to think about the technical host role in advance. Doing this enables a much smoother experience for participants.

| Time              | Content   | Purpose   | Tech Host   |
|-------------------|---|---|---|
| 12:00<br>(x mins) | Section title (name of person leading this section)<br><br>Plan for the section including: <ul style="list-style-type: none"> <li>• Content to share</li> <li>• Questions to ask</li> <li>• Relevant timings</li> <li>• Precise instructions for any activities.</li> </ul> | You should be able to name the purpose of each section. This will help you see the flow across the session. | E.g. what break-out rooms, how many, # people, # minutes<br><br>What to paste into the chat<br><br>Links to share - e.g. to <i>Mural</i> , <i>Google Docs</i> |

## Using Zoom break-out rooms

Breakout rooms are an important part of many online meetings and workshops. Here are some resources to get you started:

- **An essential first step is to switch on the breakout rooms feature on in your Zoom settings.**
- **Zoom has a quite comprehensive guide to breakout rooms including more recent features.**

You can use breakout rooms in many ways including:

- **At the beginning of a session, split people into pairs for a few minutes to respond to a prompt together.** Then repeat with different pairs. This is the essence of impromptu networking and gets people used to being whisked away to breakout rooms.
- **Give a group of 4–6 people longer to talk and go deeper into a topic in a **Conversation Cafe** format.** For this one, you'll need to give clear instructions in advance in the chat and/or on a slide.
- **Give groups a task to do together and ask them to record their ideas on a slide.**
- **You can even replicate an Open Space session (or a party) by enabling people to move themselves between breakout rooms.**

It's highly recommended to paste questions and exercises into the chat before you send people into breakout rooms. That way, they don't have to remember what you just said. In fact, this is helpful even if people aren't going into breakout rooms.

Note that you may need to update your Zoom to the latest version in order to make the most of the new features.

## Using online platforms

There are many choices for places to write together including (roughly in order of speed of set-up) Google JamBoards (great for sticky notes), Google Slides and bespoke tools like Miro and Mural.

When choosing between tools, consider how easy it is for people to get started – do they need to sign up for an account or learn a whole new interface? – as well as the features you need. **This blog post** is a helpful guide for choosing tools.

Make sure to give yourself time to set things up in advance if you're using slides. Make sure the document is shared (for viewing and/or editing) and has a title that makes it obvious what it is. Clearly label where people should be writing. If you've got 50 break-out groups, you'll need 50 places to write. And beware of exceeding participants' technical capability: Zoom video, chat and breakout rooms plus writing in another window is a lot to handle all at once.

Platforms like **Mural** and **Miro** have a host of guides online to get you started. However, giving yourself 20-30 minutes to just go on the platform, maybe with a colleague, and click around on all the buttons will help you learn quickly. It's highly unlikely that you'll break the internet!

## The tech host role and co-facilitation

It works so much better to work as a pair (or more) when hosting a virtual meeting. It's impossible for you to be looking at people's faces, checking for questions in the chat, preparing the next set of breakout rooms and sharing links for slides, all while giving the next set of instructions and listening intently. When facilitating alone, it's easy to miss what someone has said because you're fiddling with some settings or copying and pasting some text. With co-hosts, you can plan in advance who will be speaking in different parts of a meeting and who will be the technical producer.

The real value of working with someone else, though, is that they see your blind spots and together you'll come up with a much better meeting plan than you would by yourself.

If you are facilitating on your own, you can still spread out the work by asking others to take responsibility for timekeeping, note-taking and being the **rabbit hole monitor**.

## Expect things to take longer

A delay while someone installs Zoom. A poor internet connection when housemates are watching Netflix. Confusion from instructions not quite being clear. There are all sorts of reasons for delays in virtual meetings. Rather than feeling anxious that the time you're spending together isn't 'productive', remember that there is plenty of slack in in-person meetings too.

Often, we need to go slow to go fast. It's tempting to skip over a check-in at the beginning of the meeting or to shorten the break from ten to five minutes but it'll catch up with us later when it hasn't been made clear from the start that everyone should be participating or we run out of steam. It is also important to make time for introducing the technology if you are using something like Mural or Miro.

We need to plan for things to take longer than they would in person and be patient in the moment. Keep it human. Take time to breathe and for people to reflect by themselves. Allow for moments of levity and connection. Notice where there's disagreement and lean into it; it might not be the conversation you expected to happen, but it might be the conversation that needs to happen for things to move forward.

We may prefer to connect with others and have difficult conversations face-to-face but while that's not an option, we need to get good at doing this virtually.

**Splitting up long meetings into shorter chunks** can help us better work with the energy of the participants; virtual meetings can be exhausting! Instead of a half-day workshop, have three 90-minute sessions. When people have to travel, it makes sense to lump a whole process together for the sake of efficiency. This constraint is absent for virtual meetings.

# Becoming a better facilitator

## What to practise

The best ways to learn to facilitate are to experience, experiment, get feedback, reflect, learn and repeat.

Being a good facilitator isn't about having an arsenal of activities or flurry of frameworks. Facilitation is a skill that can be learned and practised. Like getting better at playing an instrument or a sport, it helps to break things down into elements that can be practised more deliberately.

Here are some ideas for what to practise:

- **Giving clear instructions.** Write them out and practise saying them. Maybe test them with someone else.
- **Asking effective and creative questions.** Try this in conversation and in meetings. Notice how people respond and what happens as a result.
- **Thinking through scenarios.** Come up with a few different ways a meeting could unfold. It might help to consider how you could close the session well so there are some next steps even if you haven't got to the place you intended.
- **Judging how much time is needed and adjusting to changing circumstances.** Reflect back on meetings where you are facilitating and also those where you are a participant. Where did the agenda slip? Did the agenda go as planned? Should there have been more of an adjustment? What could have been shortened or dropped? Trying improvisational acting or comedy (known as 'improv') can also help you to respond creatively in the moment.
- **Listening and observation skills.** Listen right to the end of what people are saying rather than auto-completing while you think about how you will respond. Ask yourself during a meeting, what's the emotional field? How's the energy of the room?
- **Working with emotion and conflict.** Use mindfulness to recognise when you are getting caught up in a wave of emotion. It can help to have a trusted co-facilitator for these moments. It can help to take a breath, maybe give the group a break to cool down, go for a walk and/or have a stretch.

## How and where to practise

**"You won't discover and invent anything unless you get used to taking risks and trying new things on a regular basis. Make it a practice to try at least one new thing every time you gamestorm."**

*Gamestorming*

Dave Gray, Sunni Brown and James Macanuso

Find opportunities to try stuff out in a safe space. This could be in a small internal meeting with trusted colleagues. Testing out ideas in this low-stakes context gives you the space to make mistakes and also to give you the confidence to try things out elsewhere.

Ask for feedback at the end of each session you facilitate about what people appreciated and what they would like to be different. You could ask a colleague ahead of the meeting that you would like them to give you feedback afterwards.

Finally, find opportunities to be well-facilitated. For example, you can find virtual workshops that promise to be participatory. Notice how it feels to be a participant in this sort of space.

## Resources

If you are stuck with a facilitation problem, Google is your friend! There are many facilitation resources online such as this website dedicated to check-ins.

The [The Liberating Structures community](#) organises a bunch of workshops that are free to join. This includes opportunities to learn how to apply different structures online. You can join the [Slack group](#) to meet people offering their expertise for free, and look at this [guide to using Liberating Structures virtually](#).

The [Rees McCann website](#) offers a lot of advice on virtual facilitation, including free guides, a helpful newsletter and some free workshops.

If you prefer listening to reading, the [Conversation Factory podcast](#) hosted by Daniel Stillman can provide a lot of inspiration.

## Books on facilitation

- ***The Art of Gathering: How We Meet and Why it Matters*** by Priya Parker
- ***A Beautiful Question: The Power of Inquiry to Spark Breakthrough Ideas*** by Warren Berger
- ***Compassionate Conversations: How to Speak and Listen from the Heart*** by Diane Musho Hamilton, Gabriel Menegale Wilson, and Kimberly Myosai Loh
- ***The Doodle Revolution: Unlock the Power to Think Differently*** by Sunni Brown
- ***Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers*** by Dave Gray, Sunni Brown, and James Macanufo
- ***Good Talk: How to Design Conversations that Matter*** by Daniel Stillman
- ***The Skilled Facilitator*** by Roger Schwarz
- ***Sprint: How to Solve Big Problems and Test New Ideas in Just Five Days*** by Jake Knapp
- ***Unlocking the Magic of Facilitation: 11 Key Concepts You Didn't Know You Didn't Know*** by Sam Killermann and Meg Bolger

## Guides to virtual facilitation

- [Online Learning – What we've learnt so far.](#)  
Nicole Barling-Luke
- [Five Ways to be More Intentional with Virtual Meetings](#)  
- Jamie Pett
- [A how-to guide for virtual facilitation and collaboration with remote groups](#) - Collective Mind
- [The Definitive Guide to Facilitating Remote Workshops](#)  
- Mural

## APPENDIX: Document URLs

For use with non-digital versions of this handbook.

| page | content   | URL   |
|------|---|---|
| 6    | A how-to guide for virtual facilitation and collaboration with remote groups                  | <a href="https://bit.ly/remote-groups">https://bit.ly/remote-groups</a>   |
| 7    | Conversation Design template  | <a href="http://www.mural.co/templates/conversation-design">www.mural.co/templates/conversation-design</a>                        |
|      | Liberating Structures website   | <a href="http://www.liberatingstructures.com">www.liberatingstructures.com</a>  |
| 14   | Check-in questions  | <a href="https://checkinsuccess.com/question-archive/">https://checkinsuccess.com/question-archive/</a>                           |
|      | Fun Retrospectives: check-out activities  | <a href="http://www.funretrospectives.com/category/check-out/">www.funretrospectives.com/category/check-out/</a>                  |
| 16   | Liberating Structures: 1-1-2-4-all  | <a href="http://www.liberatingstructures.com/1-1-2-4-all/">www.liberatingstructures.com/1-1-2-4-all/</a>                          |
|      | Question storming: A guide for brainstorming questions  | <a href="http://www.maxjoles.com/blog/question-storming">www.maxjoles.com/blog/question-storming</a>                              |
| 17   | Liberating Structures   | <a href="http://www.liberatingstructures.com">www.liberatingstructures.com</a>  |
|      | Liberating Structures instructions  | <a href="http://www.liberatingstructures.com/ls/">www.liberatingstructures.com/ls/</a>  |
| 19   | Zoom: Getting started with breakout rooms   | <a href="https://bit.ly/zoom-breakoutrooms">https://bit.ly/zoom-breakoutrooms</a>   |
|      | All you need to know about using Zoom breakout rooms  | <a href="https://blog.zoom.us/using-zoom-breakout-rooms/">https://blog.zoom.us/using-zoom-breakout-rooms/</a>                     |
|      | Liberating Structures: Conversation Café  | <a href="http://www.liberatingstructures.com/17-conversation-cafe/">www.liberatingstructures.com/17-conversation-cafe/</a>        |
|      | Choosing tools  | <a href="https://bit.ly/choose-tools">https://bit.ly/choose-tools</a>   |
|      | Mural: getting started  | <a href="https://bit.ly/Mural-gettingstarted">https://bit.ly/Mural-gettingstarted</a>   |
|      | Miro: getting started   | <a href="https://bit.ly/Miro-gettingstarted">https://bit.ly/Miro-gettingstarted</a>   |
|      | Rabbit-hole monitor: Beth Kanter  | <a href="https://bethkanter.org/elmo-technique/">https://bethkanter.org/elmo-technique/</a>                                       |
|      |   |   |
| 22   | Liberating Structures community   | <a href="http://www.liberatingstructures.com">www.liberatingstructures.com</a>  |
|      | Slack Group<br>(create account / sign-in required)  | <a href="https://liberatingstructures.slack.com/">https://liberatingstructures.slack.com/</a>                                     |
|      | Guide to using Liberating Structures virtually  | <a href="https://virtual-liberating-structures.gdes.app/virtual-ls">https://virtual-liberating-structures.gdes.app/virtual-ls</a> |
|      | Rees McCann website   | <a href="https://reesmccann.com">https://reesmccann.com</a>   |
|      | The Conversation Factory podcast  | <a href="https://theconversationfactory.com/podcast">https://theconversationfactory.com/podcast</a>                               |
|      | Online learning – what we've learnt so far: Nichole Barling Luke                              | <a href="https://bit.ly/online-learning-sofar">https://bit.ly/online-learning-sofar</a>   |
|      | Five ways to be more intentional with virtual meetings: Jamie Pett                            | <a href="https://bit.ly/five-ways-virtual">https://bit.ly/five-ways-virtual</a>   |
|      | A how-to guide for virtual facilitation and collaboration with remote groups: Collective Mind | <a href="https://bit.ly/remote-groups">https://bit.ly/remote-groups</a>   |
|      | The definitive guide to facilitating remote workshops: Mural                                  | <a href="http://www.suddenlyremote.co">www.suddenlyremote.co</a>  |

## Curiosity Society

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We have a new imagination of the world. One in which the impact on people and the planet is re-connected into the way organisations make their decisions. One in which positive conversations between funders and change-makers mean that money is aligned with the mission of organisations and their values. And one in which everyone understands how their contributions influence the systems we collectively seek to change.

Come and see us at [www.curiositysociety.org](http://www.curiositysociety.org)

### Jamie Pett

Jamie Pett is an Associate at the Curiosity Society. He aims to create the conditions for equitable change to happen in complex systems through facilitation, research, coaching and network weaving. Jamie is also a freelance consultant, Co-Chair of the board of RESULTS UK, and founder of the London International Development Network. He has previously worked with the Overseas Development Institute, the Zanzibar Planning Commission and the Foreign, Commonwealth and Development Office.

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### we can move

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<https://wecanmove.net>

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