



# Motivate, Invigorate: Facilitate

A guide to commissioning a facilitator





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**Around the world, people in organisations, partnerships and communities are using facilitators to develop more effective teamwork and to generate open, honest and productive working relationships.**

How do you go about bringing in a facilitator and prepare your team, organisation or other community group to make the best use of them? This booklet has been written to help groups identify when a facilitator could benefit their organisation.

As part of their Learning Laboratories programme, the Academy for Sustainable Communities (ASC) funded Integreat Yorkshire to develop four facilitators with the knowledge, skills and confidence to facilitate \*Town Teams and other relevant organisations.

The result was the Town Teams Facilitator Development Programme, which used a homegrown approach to develop facilitators, resulting in long-term cost savings and ensuring that knowledge and learning stays within the community.



“As chair of a town team, and someone who has often been asked to chair community meetings, I thought that there was little I could learn about how to conduct meetings. I was wrong! The training has enabled me to see what facilitators who work with us are doing and what they are not doing. It has given me a whole series of tools, which I am already using to facilitate meetings. I hope to help other groups as the Renaissance Friends network develops.”

**Rev James Allison**, Chair, Upper Calder Valley Renaissance

During this training, the importance of having a pool of good quality facilitators for all kinds of organisations in Yorkshire and the Humber was highlighted. As such, Integreat Yorkshire is taking steps towards developing a facilitator’s

development network, which will increase the provision of good quality facilitators in the region.

\* The Town Team is a group of local people who work with their community to identify and deliver transformational projects.



## What is Facilitation?

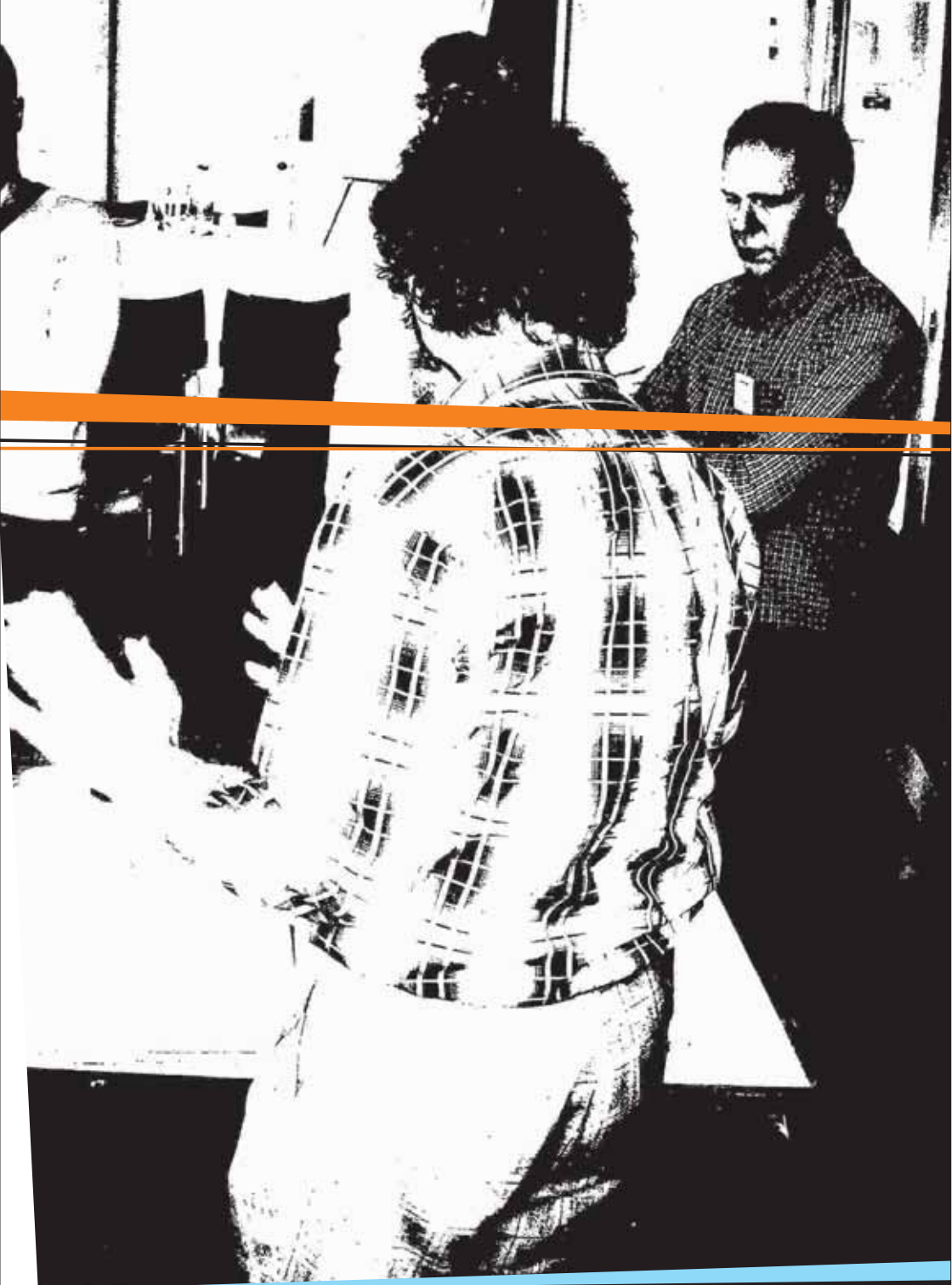
Put simply, it's the use of a range of methods to bring out the best in people whilst they work together.

### What can facilitation be used for?

- Solving problems and making decisions
  - Building really effective teamwork
  - Developing your vision
  - Involving the community in a consultation session
  - Running exciting and interactive break out sessions at conferences
  - Making the most of an away day
  - Helping to resolve sticky team relationships
  - Enhancing a training event
- And the list goes on....

“As a Regeneration Manager my work covers two Town Team areas and I was asked to get involved in the Learning Lab Project after speaking at the Renaissance Reunion. I hoped that the programme would give me the skills to help groups adopt creative thinking processes and reach consensus on shared issues. My expectations were exceeded and the Learning Lab has helped me enormously in my work, including the development of a large Renaissance project in Whitby. I am now keen to develop my facilitation skills within Town Teams and other active partnerships.”

**Sarah Fenwick;** Coast and Moors Voluntary Action





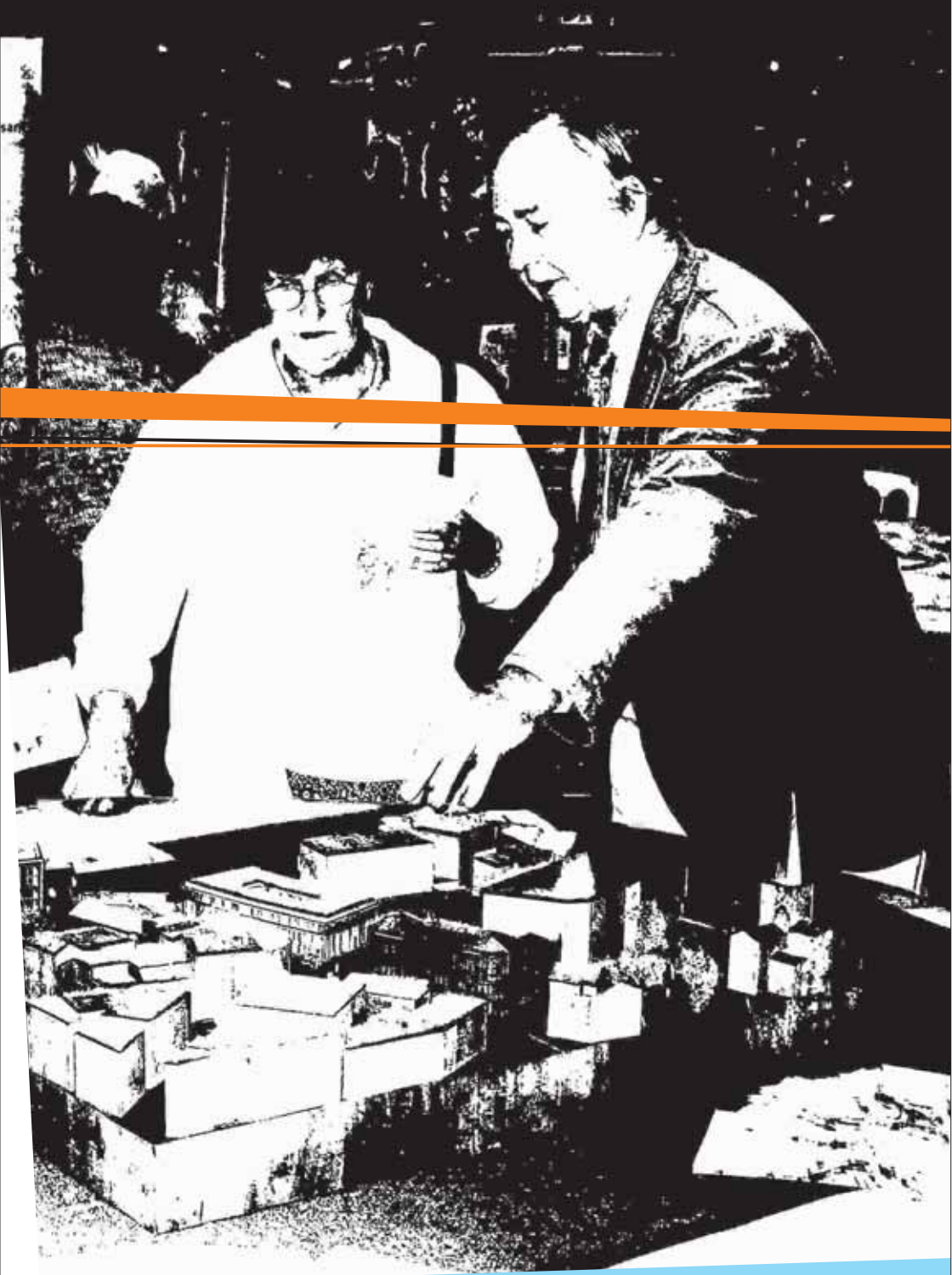
## What are the limitations of facilitation?

- Facilitation isn't a panacea for all ills, but it can help you to address problems more effectively.
- The facilitator is there to help you take a fresh, creative look at the issues you're facing; not to solve them for you.
- The process of facilitation can open up a can of worms, which will need to be addressed. This may feel uncomfortable.
- Although the techniques can be very effective, there are times when bringing in an external facilitator is advisable, for example when carrying out team building.
- One of the key things you are 'buying in' is the facilitator's ability to think on their feet. They have the advantage of being distant from the issue, and can quickly change approaches when they see one method isn't working.

**Be clear (and realistic) about what you want the facilitator to achieve.**

"I've used facilitators for many projects and in many places. A good facilitator allows the Chair to hang up their role so they can get a different perspective or discover the position of a team member which may not be usually heard for what ever reason. Basically a facilitator should unlock and articulate the issues that are required to be driven by the group that employs/appoints the facilitator."

**Barra Mac Ruairí RIBA FRSA**, Head of Renaissance Towns & Cities, Yorkshire Forward, Dec 2007





You've made the decision to contract a facilitator to work with you and your team, so what's next?

- 1.** Identify the one thing you must achieve from the session, this is your main objective.
- 2.** What might be the next important outcome? Remember in terms of outcomes the maxim 'less is more' applies strongly. For example:
  - a.** "We will have established an action plan for improving our team meetings."
  - b.** "We will have developed a clear and agreed vision."
  - c.** "We will have agreed a project plan and identified who is responsible for key tasks"
- 3.** What budget is available for the event? This may need to cover a variety of items including the facilitator's fees and their travel expenses, venue hire costs, refreshments, hire of resources such as data projectors, flipcharts, stationery and marketing costs.
- 4.** Who is going to be involved in the event? How many? Where are they from? What will they focus on?
- 5.** How long will the event be? A two-hour team meeting or a three-day residential conference?
- 6.** What do you want the facilitator to focus on? Will they be designing the whole event? Will they chair the event as well as facilitating?
- 7.** What would be the ideal venue? What sort of atmosphere do you want to create? How much room will you need? Will you need spaces for smaller groups to work in? How many facilitators will you need?



**8.** When is the event? Don't underestimate the time needed to set up a really effective event.

**9.** What administration needs to be completed, for example, tendering process and contracting?

**10.** What about the facilitator? If you want the event to be a success, you will need to identify the right facilitator for your specific needs.

“Banging two or three heads together before the meeting to work out what you want to achieve and how you will go about it is always productive, though you have to ensure that you think through how to involve the various members of the group who may not be part of your planning team. Keep it focused on results and linked to objectives.

The importance of a facilitator listening to the group on the day is as critical as their background research and preparation.

Planning is critical; facilitation is not just an exercise on the day.”

**Camilla Govan**, Marsden and Slaithwaite Renaissance Vice - Chair



There are certain key questions you need to ask yourself and the facilitator;

- What generalist and specialist skills are required? For example, a general knowledge of how teams function, specialist knowledge of performance management, conflict resolution, developing a community vision etc.
- Does the facilitator understand the context in which your team operates? You'll need a skilled facilitator who has experience of working with similar teams and knows what drives the people that are likely to be at the event.
- How much preparation work will be involved, and how much will this cost? Remember the facilitator will need some time to prepare and the more you want them to do the more it will cost.
- The facilitator should be able to suggest a range of techniques which will help ensure you achieve your outcomes.



- How creative will you want the session to be?  
Are there any hidden agendas?
- How challenging do you need your facilitator to be? If the facilitator doesn't provide the team or group with sufficient challenges, you may not get the best possible outcome from the session.
- How much time can you both dedicate to planning the event? How many planning meetings are required to guarantee a successful event?

Do you need any preparation work from the participants? This could be as simple as reading a summary of the event, through to more detailed work such as completing questionnaires, gathering data from the organisations they represent or preparing a report or presentation. How much time will they need to do this effectively, and what would the impact be if this wasn't carried out?



## The Facilitated Session

**Working with your facilitator, you need to determine which approaches and methods will help you achieve your aims, the more interactive the better.** The number of people participating at the session will have an impact on how the event is run and the exercises you can use.

**“It was good to have a facilitator who understood our world.”**

Colne Valley Event Participant.

The start of any event should be about 'warming up' the participants. Short exercises relaxes people and gets them talking.

There are many factors that will influence the exercises or approaches that will work best. Work with the facilitator to address the following questions:

1. What do you need to achieve?
2. What are the main sections and sub-sections of the event?
3. Do the sections group naturally?
4. How can you best link the sections to provide continuity?
5. Which are likely to be more interesting to the participants?
6. Which will need more energy to make them work?
7. How much time is available, and what should take priority?
8. What do the participants know about the subject? What do they need to know?
9. Do the participants know each other? Have they worked together before? How do they get along?
10. What approaches have been tried before and how did they work?



## After the Session

**At the end of the session it helps to let the participants know how their work will make an impact.**

Think in advance, with your facilitator, about how you will evaluate the session and how this information will be shared.

The facilitator can involve the participants in a variety of ways depending on the tone of the event, be it through formal, prepared questionnaires, or more creative, fun approaches such as asking people to place themselves on an imaginary line, stretching from one wall to another, with one wall representing 'went well' and the other 'could have gone better'.

**“Being part of the Learning Laboratory training and contributing to planning our town team away day has boosted my confidence enormously.”**

**Jean Margetts**, Marsden and Slaithwaite Renaissance Steering Group

**Finally, have an exit meeting with your facilitator to work through the findings of the session.**

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# Resource guide

Some useful websites and publications:



Integreat Yorkshire - [www.integreatyorkshire.com](http://www.integreatyorkshire.com)

Yorkshire Forward - [www.yorkshire-forward.com](http://www.yorkshire-forward.com)

Chartered Institute of Personnel and Development -  
[www.cipd.co.uk](http://www.cipd.co.uk)

“The Community Planning Handbook”, Wates, Nick,  
2000, reprinted 2006, Earthscan

“The Facilitators Pocketbook”, Townsend J & Donovan P,  
1999, Management Pocketbooks Ltd.

# Checklist

Event Title: \_\_\_\_\_ Date of Event: \_\_\_\_\_

Organiser: \_\_\_\_\_ Contact Details: \_\_\_\_\_

Task to be completed	By When	By Whom	Date Finalised
1. Focus of event			
2. Desired outcomes			
3. Participants list agreed			
4. Facilitators short listed			
5. Facilitator contracted			
6. Venue agreed			
7. Programme agreed			
8. Participants invited			
9. Session methods agreed			
10. External speakers advised			
11. Presentations received			
12. Pre-programme materials dispatched			
13. Event evaluation process agreed			
14. Materials prepared			
15. Evaluation completed			



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