



Facilitation Resources

8

**Volume 8.
Designing a Volunteer
Facilitation Program**

IN PARTNERSHIP ...

**Hubert H. Humphrey
Institute of Public Affairs**
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Introduction to Facilitation Resources

During the 1990s there has been a renewed interest in citizen involvement in community decisions. While many issues are still decided by powerful and financially strong networks, the ability of the average citizen to collect relevant information, address issues with intelligence, and initiate public meetings has made the public influence greater.

Those who work with organizations have learned the need for effective facilitation skills. In the Foreword to *Facilitator's Guide to Participatory Decision Making* by Sam Kaner, Michael Doyle presents two important lessons learned. "Lesson one: if people don't participate in and 'own' the solution to the problems or agree to the decision, implementation will be half-hearted at best, probably misunderstood, and, more likely than not, fail. The second lesson is that the key differentiating factor in the success of an organization is not just the products and services, not just its technology or market share, but the organization's ability to elicit, harness, and focus the vast intellectual capital and goodwill in their members, employees, and stakeholders. When these get energized and focused, the organization becomes a powerful force for positive change in today's business and societal environments."

Facilitation Resources, available as a set of eight volumes, is an effort to enhance volunteers' group facilitation techniques. The participants will be able to use the skills in facilitating nonprofit groups and organizations through important discussions vital to the organization and to the community.

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Facilitation Resources is designed for personal use and as curriculum for educational sessions. We encourage you to make copies of the worksheets in this guide for yourself and for use by those involved in educational processes. Additional copies of *Facilitation Resources* can be ordered by calling (800) 876-8636 or by completing the enclosed order form.

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The authors of this guide have over 115 combined years of facilitator experience. The members have tested and refined many exercises and resources while facilitating and training a wide range of community groups, organizations, and companies. They recognize that in this work called facilitation, one never quits learning.

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Marian has served as Extension Educator in Rice County since 1989. Previous to that, she was Extension Educator in Big Stone County from 1968 to 1989. She earned a B.S. degree from Iowa State University and a Master of Education from the University of Minnesota in Home Economics Education. Marian specializes in Leadership/Citizenship Education, is a member of the Minnesota Association of Extension Educators, Minnesota Association of Extension Family and Consumer Science, Minnesota Facilitators Network, and many community organizations and networks. She is a contributor to Kiwanis and the Rice Unit of the American Cancer Society.

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Executive Summary: Extension Facilitation Program

Background

Extension has always been known as a source of technical expertise in areas such as horticulture. To manage the demand for horticultural information, Extension developed the "Master Gardener" program. Today, Extension is working on public policy issues that require process and citizen involvement techniques. Extension staff are being asked to facilitate community and organizational meetings, especially where their neutrality is seen as essential given the controversial nature of the public discussions. To meet the demand for facilitators, a program similar to the Master Gardener program is being developed to train and support a cadre of citizen facilitators who work with community nonprofit organizations and agencies that request a skilled, neutral facilitator.

Marian Anderson, Rice County; Mary Laeger-Hagemeister, Steele County; Roger Steinberg, Community Resources; Donna Rae Scheffert, Leadership Development State Office; and Sharon Roe Anderson, Reflective Leadership Center, Humphrey Institute, have developed an Extension Facilitator program.

Need

There is a growing need for facilitation as issues become more complex, constituents expect power to be shared, and decisions evolve to the local level. The Extension Facilitator training is an outgrowth of the Building Common Ground program which identified the value and need for skilled community facilitators and public policy educators. Following the program, many people saw themselves as "bridges" between strong, polar interests.

Extension educators face an increasing number of requests for skilled facilitators. Managing the demand by referring work to others while ensuring quality through a training program seemed to make sense. This also seemed to be a niche for Extension as nobody else is doing this type of program in the community setting. Many nonprofit groups cannot afford to hire trained facilitators from corporate settings, and desire a facilitator who has a community context rather than solely corporate experience.

Program

The pilot of this program was done in 1998 in Cluster 16 with 25 citizens. The Community Resources and Leadership/Citizenship specializations supported its development with funds and time commitment of educators. We anticipate a statewide application in 1999. The Southeast Minnesota Initiative Fund has also contributed dollars.

Six three-hour sessions are the core of the training program. Observation of groups, practice facilitating, and interaction between the training team and the citizen facilitators take place between sessions. Extension staff will market the availability of the trained facilitators as well as co-facilitate with citizen facilitators. A 20-hour community commitment is requested of each pilot participant.

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Evaluations will include feedback from participants about how helpful the information is for them for facilitating in the groups they are currently part of and by noting the number of community requests received for the Extension facilitators. Pre-assessment and post-assessment skills will be compared.

Potential Adaptations

Special adaptations of the curriculum are being considered to meet specific needs: training of facilitators who can bridge communications between the dominant culture and the immigrant refugee/newcomers in communities; applying it to the feedlot issue; and using it with governments as they do strategic planning. Six other states have indicated interest in this development from a brief sharing at a national meeting, so multistate collaboration is a possibility. The Reflective Leadership Center at the Humphrey Institute plans to include a module on facilitation with its project "Organizing Hope: Improving Public Life and Advancing the Common Good through Technology-Enhanced Learning." This means it would be available for credit or non-credit graduate or continuing education via distance education.



Overview of Designing a Program

This volume provides background information for those interested in designing a Volunteer Facilitator Training Program. Each program needs to be tailored to fit the community; however, this will provide an overview of the pilot project. More details can be obtained by contacting one of the design team members.

The need for trained facilitators in community groups and organizations was identified by another program, *Building Common Ground*. The Extension Volunteer Facilitator Program is, to a limited extent, modeled after the Extension Master Gardener Program. Trained volunteers who are interested in developing their group facilitation skills received eighteen hours of training and, in return, they volunteer back time in facilitating nonprofit groups and organizations in the area. Groups could include those the volunteers are already involved with, or those identified by Extension staff in response to community requests.

The pilot program was developed by the University of Minnesota Extension Service in Heartland Cluster in partnership with the Reflective Leadership Center at the University of Minnesota's Humphrey Institute of Public Affairs and Extension's Leadership Development Office. Funding for the program has been provided through grants from the University of Minnesota Extension Service Community Resources and Leadership/Citizenship Specializations, and the Southeast Minnesota Initiative Fund.

The program was designed to provide eighteen hours of training. The initial twelve hours were offered in three evenings a week apart: February 19, 26, and March 5; subsequent sessions were held in May, September, and November. The agendas for the first three sessions were developed by the design team; subsequent agendas were developed with input from participants. They were more actively involved in the sessions to model some of the facilitator skills. Time was allowed between the first series of trainings and the follow-up sessions for participants to observe facilitation of groups, and possibly serve as a facilitator of a group.

The target number of participants was twenty, or five per county. There were twenty-seven applications, and twenty-five did attend the training; however, counties were unevenly represented and there were a couple of participants from adjoining counties who work in the cluster counties. Promotion was done by each county through the media and flyers to local organizations and agencies. An application process was used to provide an opportunity of the design team to select participants, and to encourage those who were interested to articulate why they were interested. The group came from diverse backgrounds.

An assessment tool was developed to measure the skill levels of the participants before and after the training. Each session was evaluated.

Working with a Design Team

The seed for the Extension Volunteer Facilitator Program came from an individual in the *Building Common Ground* program. The care and nurturing of the final program is the result of an wonderful design team who had a passion for the work, and represented diverse backgrounds and experiences.



The design team included Mary Laeger-Hagemeister and Marian Anderson, Extension Educators in Heartland Cluster with the Leadership/Citizenship Education Specialization; Donna Rae Scheffert, University of Minnesota Extension Service Leadership Development Office; Roger Steinberg, SE District Extension Educator in Community Resource Development; and Sharon Roe Anderson, Humphrey Institute Reflective Leadership Center at the University of Minnesota.

There are not many examples of similar programs throughout the country. Team members were able to tap valuable resources from a variety of sources to help in the design and development of the program. The combined expertise helped to shape a stronger program.

The design team approach can be a time-consuming task. The group met for over six months before the training began. It takes a lot of time to search out resources and to develop a program that is practical for the participants and gives them the sound educational base along with the practical skills. The program needed to meet the needs and available time of the volunteers, and had to be manageable for the local Extension staff.

One of the strategic plans of the team was to make sure that the sessions were facilitated by different people. This allowed participants to observe various styles of facilitation, and learn that there is not one best way to facilitate. The participants were encouraged to call anyone of the design team members with questions.

Groups deciding to use a design team to develop a program need to know that the project will require a large commitment of time and sharing of work. The upside of this is that the program will be stronger and more complete.

Approach to Teaching Facilitation

A developmental approach was taken to plan the curriculum and educational methods for the program. The topics of the training were based on a sequential concept; first you would contract for the facilitation work, then you would create ground rules and a shared vision in the group, etc. The first three sessions were designed around the notion of “core concepts of facilitation” with short, basic introductions to a variety of topics. The next three sessions were designed around learners’ interest in more information on a topic, or from their identifying other topics of importance.

The educational methods were more “expert” during the first few sessions and more “participatory” during the second half of the series. The first sessions were teacher-led short lectures and worksheets. The final three sessions were participant case studies and development of content, such as the group defining the job description of a facilitator.

Case stories were utilized each session. The first cases discussed were for facilitating simpler, smaller groups and the last cases discussed were for facilitating very complex, conflict-habituated situations.

Cases and Stories

Most participants had recollections of numerous situations that called upon the creativity and best skills of the facilitator. In fact, many people report that some



of their best learning about facilitation was done by observing someone else in that role. Each session opened with a round-robin inviting learners to share observations and reflections either focusing on themselves or others as facilitators. Utilizing stories and cases while practicing to improve facilitation skills combines theory and action with experiential learning.

Many times people choose to learn more about a topic because they have recently experienced or are now experiencing a situation, or know they need a high level of skills in an upcoming situation. Using stories and cases as a method of teaching facilitation combines the actual situation with facilitation concepts. Often some of the best stories are those that people have recently experienced.

Participants write a brief scenario of the situation and give it to the others in the group. Together, they problem-solve about ways in which to best facilitate the situation. After the brainstorming, the person who shared the story can share “the rest of the story.” Or, people often appreciate getting ideas for situations they are currently involved in. As before, they write up a brief case and share it with the group. Defining key questions they would like help with is useful. For example, a question may be “What process would work well to prioritize the top five ideas with a group of 25 people?” or “What strategies would you suggest to minimize the input of one talkative member and encourage the quiet ones to contribute?” Instructors may also wish to write stories or cases to utilize with the group. This is particularly helpful if the group is advanced and needs the challenge of problem-solving in a complex or conflictual situation.



Example: Pilot Training Series Schedule

Session 1

Contracting
Norms and Ground Rules
Creating a Shared Vision
Group Dynamics

Session 2

Facilitator Roles
Coaching Techniques
Maintaining Neutrality
Decision-Making Techniques
Understanding Cultural and Personal Differences
Mission Statements and Goal Setting

Session 3

Conflict in Groups
Power, Authority, and Ethics
Large Group Methods
Assessment Tools

Session 4

Participants' Reports on Their Facilitations
Case Studies/Practice Facilitation

Session 5

Facilitating Controversial Issues (Case Studies)
Techniques for Difficult, Challenging Situations

Session 6

Facilitator Job Description
Closing Meetings Effectively
Reflecting on Individual Successes
Celebration



Example: Training Schedule

Extension Facilitator Training Program Schedule

Thursday, February 19, 1998

6:00 - 6:30 p.m.	-	Opening/Icebreakers	-	Marian & Mary
6:30 - 6:50 p.m.	-	Contracting	-	Roger
6:50 - 7:15 p.m.	-	Agenda	-	Marian & Mary
		Norms & Ground Rules		
7:15 - 7:25 p.m.	-	BREAK	-	
7:25 - 7:55 p.m.	-	Shared Vision	-	Sharon
7:55 - 8:25 p.m.	-	Group Dynamics	-	Marian
8:25 - 8:30 p.m.	-	BREAK	-	
8:30 - 8:45 p.m.	-	Follow-up	-	Roger
8:45 - 8:50 p.m.	-	Assessment / Homework	-	Mary
8:50 - 9:00 p.m.	-	Evaluation / What You Need	-	Sharon
9:00 p.m.	-	Close	-	

Thursday, February 26, 1998

6:00 - 6:05 p.m.	-	Opening / Icebreakers	-	Marian & Mary
6:05 - 6:25 p.m.	-	Facilitator Roles	-	Donna Rae
6:25 - 6:45 p.m.	-	Coaching	-	Sharon
6:45 - 7:00 p.m.	-	Neutrality	-	Marian
7:00 - 7:10 p.m.	-	BREAK	-	
7:10 - 7:35 p.m.	-	Managing the Change Process	-	Sharon
7:35 - 8:05 p.m.	-	Forms & Techniques of Decision Making	-	Donna Rae
8:05 - 8:10 p.m.	-	BREAK	-	
8:10 - 8:35 p.m.	-	Cultural / Personal Differences	-	Sara
8:35 - 8:50 p.m.	-	Mission / Goals	-	Roger
8:50 - 9:00 p.m.	-	Evaluation / What We Need	-	Sharon

Thursday, March 5, 1998

6:00 - 6:05 p.m.	-	Recognition / Reflection	-	Marian & Mary
6:05 - 6:55 p.m.	-	Conflict in Groups	-	Lisa & Roger
6:55 - 7:00 p.m.	-	BREAK	-	
7:00 - 8:00 p.m.	-	Power / Authority	-	Donna Rae
		Ethics		& Roger
8:00 - 8:30 p.m.	-	Large Group Methods	-	Sharon
8:30 - 8:35 p.m.	-	BREAK	-	
8:35 - 8:50 p.m.	-	Assessment Tools / Recognition	-	Mary
8:50 - 9:00 p.m.	-	Evaluation / What We Need	-	Sharon
		Next Sessions		



Case Example:

The County Historical Society Retreat

The president of a county historical society has contacted you and says she feels her board of directors needs to revisit their mission statement and goals. It has been five years since they have spent any structured time discussing them; she wants you to lead a retreat. They also need to develop next year's work plan.

Membership and, as a result, revenues have been decreasing. Next month the county board will make a decision about their annual contribution to the society, but have told the society they are looking at across-the-board cuts for all their programs and departments.

Three cities in the county have their own local historical groups; all three are growing and prospering. This is a sensitive issue with the county organization. They work informally together, but the county has no authority over them. The president has said she doesn't want the subject of the three local chapters brought up during the retreat because it creates tension between board members, and she definitely doesn't want them to have any representation in the goal-setting process.

The staff (director) called you a day after the president did. He hinted that the staff are lukewarm to the idea, at best. They are feeling overworked now and feel new goals translate into new work. He also suggested that not all the 15 board members are interested in committing any additional time beyond their monthly meetings. And, in fact, the president said she feels only 8 to 10 might participate in the retreat, hinting there is some divisiveness within the board over a number of issues. For that reason, she wants to keep the retreat to three hours, and not include the staff because she senses their lack of support for the process.

You have set a meeting up with her tomorrow. Using the contracting outlines, discuss your strategies for the meeting with her knowing you will have to make a decision on whether to accept this facilitation.



Case Example:

The County Feedlot Committee

Several weeks ago the chairman of the county board contacted you about facilitating a county feedlot advisory committee the board is in the process of appointing. He said they want a small group to meet over the next six months to develop recommendations to the board on the county's roles and responsibility with feedlots. The county planning director will staff the effort, set up meetings, do mailings, etc.

Yesterday you read in the paper the "small" group has grown to 30 people. While the county board's goal of bringing all affected parties to the table is admirable, you're familiar enough with the names to know some of these folks just plain don't like each other. The potential for controversy definitely exists. The article also said a facilitator had agreed to work with the group, but it didn't name you.

This is a rural county with only one community over 20,000, but it does have, in addition to a daily newspaper, one television and two radio stations. All regularly report on feedlot controversies both locally and statewide. They will no doubt be covering and reporting on committee meetings. The chair of the county board and the planning director are meeting with you tomorrow. Using your contracting outline, discuss your strategies for this meeting knowing they will want a definite yes or no from you, and your recommendations on the process.



Case Example:

The Church Camp

You have just received a call from a youth minister at one of your local churches. He wants you to facilitate a summer camp planning committee. For the past three years they have taken 20 high school juniors for a weeklong camp in the Black Hills. He and four parents serve as chaperones and arrangement coordinators.

This year, for the first time, some of the youth have asked to be involved in planning the trip. He goes on to explain that two of the parents have hinted that they don't see much value in involving the youth. Past trips have always gone well; they feel this will just take extra planning time. The minister says he knows there is value in including the youth, but also knows adult volunteers are hard to recruit, and are truly busy people.

Because of this he would like to get this first planning done in a two-hour evening session. He adds that they also need to include some time to talk about fund-raising for the trip.

Having you facilitate, he says, will let him be more involved in the discussion; but he is also counting on you to make sure the youth have meaningful input. You need to call him back tomorrow to work on the "specifics." Using the contracting outline, how would you design this initial planning session?



Case Example: The Gift

The Annual Meeting of a Local Conservation Organization

The local chapter of this well-known national conservation organization has a pleasant, but challenging, task at this annual meeting of the full membership. A wealthy benefactor recently passed away and left them \$100,000. Prior to this almost all their budget has come from membership dues and small fund-raisers. They have not had nearly this much money before to decide how to spend. The chapter president has said he would like to take about an hour to decide what to do with the inheritance. In your contracting discussion, he has said he wants the membership to set their own agenda/decision-making process so that it doesn't look like he is controlling the decision.

The mission of the organization is to improve and protect wildlife and their habitat in the county.



Case Example:

A Sexual Orientation/4-H Leader Controversy

Janice is a 4-H club leader in a neighboring county. She has learned that a family interested in joining her club includes a sixteen-year-old who admits openly that she is a lesbian. Janice holds moral beliefs that homosexuality is wrong and is a sin. She will accept the family on condition the sixteen-year-old lesbian daughter is excluded from participating in 4-H. Janice has, in the past, signed the non-discrimination form for her club, but now challenges the validity of it. Several other 4-H club leaders along with Janice have asked for a meeting on the issue with the Extension Committee, the County Commission, and a representative from the Extension Office in her county. The chair of the County Extension Committee has asked you to facilitate the meeting.

Questions:

1. What issues need to be addressed?
2. Are there others that need to be at the meeting? If so, who?
3. How should this facilitation be planned and implemented?
4. What preparatory steps do you as a facilitator need to take?



Case Example:

Family Service Collaborative

The chairperson of a family service collaborative (FSC) has called you to work with her group. Because of your reputation as being an excellent facilitator of groups where there is longstanding conflict, you are urgently requested to work with this family collaborative.

After having a pleasant conversation with the chairperson and agreeing to work with the group, you try to find out as much background information as possible in the two weeks prior to the meeting. You have a packet of notes, reports, and other data about the group sent to you. You also telephone six members who volunteered to share their perspectives (at the last meeting) with a facilitator prior to the next meeting.

The FSC has accomplished many of the goals it set for itself three years ago. Now, it is finalizing the process of building a family center in a previously underserved service area. The conflict had initially arisen over which family agency would be the lead agency to oversee management of the new center. Once the decision was made to give management responsibilities to Agency A, the work of the collaborative seemed to disintegrate. Some of the other issues identified in telephone interviews (made prior to facilitating a meeting) were:

- The group meetings focus on reporting and updates and are seemingly cordial; the conflict is only apparent between meetings; conflict occurs with interactions of the members of the collaborative and with members of the collaborative and the chairperson.
- This is the third of a series of meetings where planning has occurred but there has not been progress on goals because of the increasing tension between members.
- The collaborative states in its mission to involve citizens, but the group that meets on a monthly basis no longer has regular citizen participation.
- Agency A sends a middle manager to FSC meetings but the Executive Director makes all the decisions for Agency A.
- Participants do not trust one another, nor do they trust that what they contribute in the FSC meetings will not be used against them.
- Decisions made during FSC meetings are not adhered to by all members.
- There are different views about what the purpose and outcomes of the next meeting should be. There are also differing views about where/how/who/what conflict is inhibiting the work of FSC.

What plan do you develop for the next FSC meeting, which you will be facilitating? A few of the givens are: you have three hours to work with the group, the place reserved for the meeting is a community center, and a majority of the FSC regular members will attend.



Marketing Volunteer Facilitators to the Community

Any volunteer program needs to be marketed to the public to create an awareness of the program and to inform groups how to request a volunteer. Publicity for the current program was done as the training occurred. A brochure has been developed for each county to distribute to nonprofit organizations and groups to promote the program. News releases or information in newsletters continues on a regular basis.

As requests come into Extension offices from groups seeking a facilitator, Extension educators match the request to the potential volunteer facilitator. For example, a group in Freeborn County requested Roger Steinberg to come and facilitate a meeting. Roger involved one of the Freeborn facilitator volunteers as a co-facilitator. Another volunteer assisted Roger in facilitating a Rice County Commissioner & Department Head meeting around county needs. This provided them with an opportunity to gain facilitating experience while observing another person facilitating a process.

Some of the volunteers have been developing their skills with groups they are involved with in their communities. This is also a way to use the skills they have received through the training. An activity report for volunteer facilitators helps to track the work and document the volunteer commitment of the facilitators.



Sample News Release



NEWS RELEASE

EXTENSION TO OFFER FACILITATOR TRAINING

The University of Minnesota Extension offices in Freeborn, Mower, Rice, and Steele counties are seeking 20 volunteers who are interested in receiving training in group facilitation. In exchange, participants agree to volunteer a minimum of 20 hours of facilitation for local community groups and organizations.

Participants will receive three evenings of initial training beginning in February followed by three working sessions during the year. The sessions will be taught in Owatonna by faculty of the Reflective Leadership Center at the University's Humphrey Institute of Public Affairs and Extension's Leadership Development Office. Topics include facilitation methods, group dynamics, listening skills, dealing with conflict and controversy, and a variety of goal-setting techniques.

To learn more about the program and/or receive an application, contact your local County Extension Office. **The application deadline is January 23, 1998.**

Kendall Langseth
Freeborn County
507-377-5660

Dave Quinlan
Mower County
507-437-9552

Marian Anderson
Rice County
507-332-6164

Mary Laeger-Hagemeister
Steele County
507-444-7690



Sample Application

UNIVERSITY OF MINNESOTA

Extension

S E R V I C E

EXTENSION FACILITATOR Application Form

Please Type or Print

1. NAME _____
2. MAILING ADDRESS _____
3. COUNTY _____
4. TELEPHONE NUMBER (Home) _____ (Work) _____
5. Why do you wish to become an Extension Volunteer Facilitator and enhance your facilitator skills? (Include some specific things you would like to learn.)



6. Drawing from your experience in local groups and organizations, evaluate the facilitation and/or group processes.

(a) What is working well?

(b) What could use some improvement?

7. Please describe any education, training, or experience as a facilitator, mediator, and/or negotiator that you have.

(a) Education/Training __Yes __No If Yes, Explain

(b) Experience __Yes __No If Yes, Explain

(c) Mediation __Yes __No If Yes, Explain

(d) Negotiation __Yes __No If Yes, Explain

8. After completing this training, I am committed to volunteering a minimum of 20 hours.

Signature

For questions and/or additional information contact:

The University of Minnesota Extension Service is an Equal Opportunity Educator and Employer.



Sample Detailed News Release

Mary Lager-Hagemeister, extension educator

SPECIAL NEWS RELEASE – IMMEDIATELY

Friday, March 27, 1998

Extension Facilitator Program Begins

The University of Minnesota Extension Service in Heartland Cluster (Freeborn, Mower, Rice and Steele Counties) has established a volunteer Extension Facilitator program to train individuals in group facilitation techniques. These individuals will volunteer time back to groups they are currently involved with, or other community groups requesting an outside facilitator. This is a pilot effort and there are few models of similar programs in the United States.

If you are like many people, you participate in different groups and organizations that need to conduct business and make decisions. As you experience different groups, you will observe a variety of ways groups use to get the business of the organization accomplished. I have been at some meetings that have addressed difficult issues, yet the group seemed to move through the process in a systematic way and reach a decision that reflects the best interest of the group. On the other hand, I have left a few meetings feeling we went nowhere—in fact, probably created more problems than answers. In most cases, the positive meeting experiences have occurred when a good facilitator leads the group through the process.

There seems to be a new level of public involvement emerging in which citizens are actively involved in community groups and organizations to identify

- CONTINUED -



EXTENSION FACILITATOR PROGRAM, page 2 of 3

issues and help define possible solutions. This collaborative process empowers citizens to decide on the issue, expand the communication process, and develop equitable and fair solutions.

Whether you're involved in a nonprofit organization or group, or involved in a public discussion around community issues, skilled facilitators are key players in the process. Sometimes a person from within the group can facilitate the group discussion; at other times it is wise to have someone from outside the group come in and lead the group process. The decisions will remain with the group members; the facilitator guides the process.

Some organizations use Parliamentary Procedure to conduct meetings on a regular basis. A facilitator uses other models to involve the group in the decision-making process. A facilitator's work deals with the content and the process of the meeting. Content is focusing on what the group and individuals are talking about; the process refers to how the group is working. A good facilitator refrains from participating in the discussion and offering opinions. If a person wants to be involved in the discussion, that person should not be acting as the facilitator. This is often the point where an outside, impartial person is called in. The facilitator role is one of guidance and assistance, never control over decisions.

The facilitator group of 21 participants from Rice, Steele, Freeborn and Mower counties have attended three workshops, and will continue to participate in additional training this year. From Rice County eight individuals have been involved in the program. Some of these individuals are willing to

– CONTINUED –



EXTENSION FACILITATOR PROGRAM, page 3 of 3

volunteer to facilitate meetings of community groups or organizations where an outside facilitator would make it easier for the group to do its work. The volunteers will generally work in teams.

Community groups or organizations interested in having an individual or team of facilitators help with group process can call the U of MN Extension Service-Steele County, 507-444-7690 and visit with Mary Laeger-Hagemester about connecting with one of the volunteers.

MLH/csa

#



Sample Brochure

Related Extension programs/presentations available to groups and organizations:

- Ethical Decision Making
- Conducting Effective Meetings
- Colors Personality Style Inventory
- Creating Your Organization's Mission Statement

The Volunteer Extension Facilitator Program is a part of the University of Minnesota Extension Service in Heartland Cluster with staff and financial support from the following:

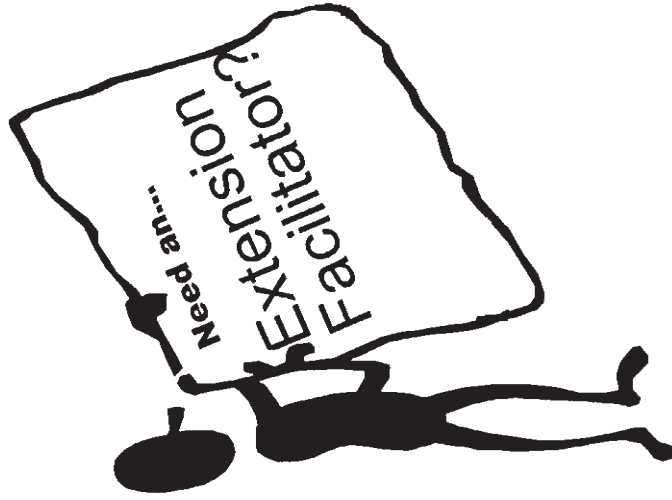
- Extension Leadership Development Office at the University of Minnesota
- Reflective Leadership Center in the Humphrey Institute at the University of Minnesota
- Extension Community Resources Specialization
- Extension Leadership/Citizenship Education Specialization
- The Initiative Fund of Southeast Minnesota

The University of Minnesota Extension Service is committed to the policy that all persons shall have equal access to its programs, facilities, and employment without regard to race, color, creed, religion, national origin, sex, age, marital status, disability, public assistance status, veteran status, or sexual orientation.

UNIVERSITY OF MINNESOTA

Extension

S E R V I C E



"Group members need to feel that they are valuable in the group and that their efforts or contributions have impact on the group's work."

... Terry Bacon

"A good sign that either the meeting or some of the people are superfluous is when they try to get out of coming."

... Robert Heller

"The challenge for the facilitator is to become comfortable with ambiguity and not impose order prematurely by rushing to inferences and diagnosis."

... Roger M. Schwarz

"The greater thing in this world is not so much where we stand as the direction where we are going."

... Oliver Wendell Holmes

Volunteers trained to lead groups are available!

Sponsored by:
University of Minnesota Extension Service in Heartland Cluster
(Rice, Steele, Freeborn, & Mower)



What can an Extension Facilitator do for your group?

- *Bring an unbiased perspective*
- *Keep the group focused on the issues*
- *Help the groups problem-solve*
- *Help the group set goals*

Volunteer Extension Facilitators are trained in:

- *Group facilitator methods*
- *Group dynamics*
- *Listening skills*
- *Consensus building*
- *Dealing with conflict and controversy*
- *Goal-setting techniques*
- *Working with diverse audiences*

Volunteers are available for facilitation to:

- *Nonprofit and community organizations and local governments in the four-county area of Rice, Steele, Freeborn, and Mower.*
- *Public meetings, retreats, and planning sessions for groups and organizations.*

How to connect with an Extension facilitator

Call your county Extension office:



Cost:

Facilitators' mileage and expenses incurred in travel and during the session may be required in some cases. There is no fee for their time.



Pre/Post Participant Assessment

It is important to understand the background and confidence levels of learners of facilitation. The following Pre-assessment Worksheet was custom designed to give the instructors more knowledge of the learners. The assessment was completed by participants the first evening of the program. Concepts included in the pre-assessment were:

Overall confidence level as facilitator

Rating of maturity of facilitator (beginner, mid-career, seasoned professional)

Understanding of topics (to be included in training program):

The data from the assessment were used by the design team and instructors to build the program and the curriculum. It was extremely helpful to make decisions about use of time, level of information to provide, support needed, and other matters.

The Post-assessment Worksheet will be used to compare where learners saw themselves at the beginning of the program with their sense of their skills, knowledge, and confidence at the end of the program. This instrument could also be used after one year or more following the formal program because the “experience facilitating” is an important aspect of the program.

In addition to the personal assessments, each session was evaluated. These data were useful to help plan the next sessions and will help improve upon the replication of the program model.



8. Designing a Volunteer Facilitator Program

Pre-assessment Worksheet

Evaluating Yourself as a Facilitator

On a scale of 1 to 10, how confident are you that you serve effectively as a facilitator?

1	2	3	4	5	6	7	8	9	10
Not a snowball's chance									Watch my dust!

Do you consider yourself (as a facilitator) to be a:

- Beginner
 Mid-career
 Seasoned professional

On a scale of 1 (poor) to 5 (excellent), rate your understanding of the following topics:

	<u>Poor</u>	<u>Fair</u>	<u>Good</u>	<u>Very Good</u>	<u>Excellent</u>
Understanding the context	1	2	3	4	5
Contracting to do the work	1	2	3	4	5
Logistics/physical environment	1	2	3	4	5
Icebreakers/openers	1	2	3	4	5
Norms and ground rules	1	2	3	4	5
Management of group dynamics	1	2	3	4	5
Developing a shared vision	1	2	3	4	5
Task process competencies	1	2	3	4	5
Coaching	1	2	3	4	5
Neutrality/establishing trust	1	2	3	4	5
Managing change	1	2	3	4	5
Ways to make decisions	1	2	3	4	5
Cultural/personal differences	1	2	3	4	5



8. Designing a Volunteer Facilitator Program

	<u>Poor</u>	<u>Fair</u>	<u>Good</u>	<u>Very Good</u>	<u>Excellent</u>
Conflict resolution and management	1	2	3	4	5
Managing power/authority issues	1	2	3	4	5
Ethics	1	2	3	4	5
Large group methods	1	2	3	4	5
Computer-based assessment tools	1	2	3	4	5
Friendliness	1	2	3	4	5
Sensitivity	1	2	3	4	5
Sincerity	1	2	3	4	5
Sense of humor	1	2	3	4	5
Self-awareness	1	2	3	4	5
Emotional stability	1	2	3	4	5

Review the list above and choose four or five areas where you would be willing to dedicate time and energy to improve.

1. _____
2. _____
3. _____
4. _____
5. _____



Post-Assessment Worksheet

Evaluating Yourself as a Facilitator

On a scale of 1 to 10, how confident are you that you will effectively serve as a facilitator?

1	2	3	4	5	6	7	8	9	10
Not a snowball's chance								Watch my dust!	

Why did you mark it where you did?

On a scale of 1 (poor) to 5 (excellent), rate your understanding of the following topics:

	<u>Poor</u>	<u>Fair</u>	<u>Good</u>	<u>Very Good</u>	<u>Excellent</u>
Contracting	1	2	3	4	5
Logistics	1	2	3	4	5
Icebreakers/openers	1	2	3	4	5
Norms and ground rules	1	2	3	4	5
Group dynamics	1	2	3	4	5
Developing a shared vision	1	2	3	4	5
Facilitator roles	1	2	3	4	5
Coaching	1	2	3	4	5
Neutrality	1	2	3	4	5
Managing change	1	2	3	4	5
Ways to make decisions	1	2	3	4	5
Cultural/personal differences	1	2	3	4	5
Mission/goals	1	2	3	4	5
Conflict	1	2	3	4	5
Power/authority	1	2	3	4	5
Ethics	1	2	3	4	5

Worksheet: Make copies for use at future meetings.



8. Designing a Volunteer Facilitator Program

	<u>Poor</u>	<u>Fair</u>	<u>Good</u>	<u>Very Good</u>	<u>Excellent</u>
Large group methods	1	2	3	4	5
Sorting out the data	1	2	3	4	5
Assessment tools	1	2	3	4	5
Evaluation	1	2	3	4	5

Within the last year, how much facilitation have you done?

_____ (estimate number of hours)

Describe the kinds of groups or organizations you have worked with over the last year.

Of the groups you have facilitated, how many were:

- _____ easy to facilitate
- _____ average to facilitate
- _____ tough to facilitate

For you, what were the strengths of the facilitation training?

For you, what were the weaknesses of the facilitation training?

What suggestions do you have to improve the facilitation training?



Individual Session Evaluation

How did today go for you?

Highs?

Lows?

Regarding today's topics, what is still unclear to you?

What were the most important things you learned today?

On a scale of 1 to 10, how confident are you that you serve effectively as a facilitator?

1	2	3	4	5	6	7	8	9	10
Not a snowball's chance									Watch my dust!

Why did you mark it where you did?

Based on this session, what would be helpful? What do you still need?



Sample Activity Report for Facilitators

Group/Organization

(Very) Brief Description of the Work *(including number involved)*

Approximate Number of Hours Involved

Planning Time

Facilitation Itself

Some "Highs" and "Lows" *(What worked and what didn't)*

Based on This Experience *(Any recommendations to us on future training efforts)*

NAME _____

Please Return to:

Worksheet: Make copies for use at future meetings.



Volunteer Facilitation Program— Evaluation Summary

Participant evaluation pre- and post-assessments were reviewed and an evaluation report was prepared by a team from the Reflective Leadership Program (Jon Nauman, Peter Dick, and Stella Cheung).

Pre-program Evaluation Synopsis

Prior to the program, participants were asked about their confidence in themselves as facilitators. This was compared with the results of a similar question asked at the end of the program.

- Fifty-six percent of the respondents were somewhat confident to very confident (above a score of 5 on a 10-point scale) that they can serve effectively as a facilitator.
- The range of confidence levels was from 1.5 to 8 with clustering at 4 and 6 (on a 10-point scale).
- Nearly two-thirds (61 percent) of the respondents considered themselves (as a facilitator) to be a beginner.
- On average, 17 of 19 topics to be covered in the facilitation training were rated as good (respondents had a good understanding of the topic) except contracting (poor understanding) and logistics (fair understanding).
- Seventy-seven percent of the respondents indicated that they had spent more than five hours facilitating within the last year.

Post-program Evaluation Synopsis

- The percentage of respondents who were somewhat confident to very confident in their ability to serve effectively as a facilitator increased to 100 percent.
- The movement of confidence levels was significant, with all respondents rating confidence at a 6 or above and a clustering at a level 8 (on a 10 point scale).
- The average rating of understanding of concepts taught in the training program increased for all topics (respondents gave ratings of good to a very good understanding of the topics). None of the topics covered received a poor rating by the respondents.
- The greatest strengths indicated by the respondents are attributed to the staff and the topics covered in the training.
- The greatest weaknesses indicated are the time factor and not being able to apply learned lessons to real-world situations.
- The following suggestions were offered by the respondents to improve the facilitation training: more time for the topics; better training setting; real-world situations; add topics of networking and marketing to acquire facilitation opportunities; expand the topic of conflict management; and increase follow-up care and mentoring.

Contact one of the Design Team members for the complete evaluation report.



Facilitator Program Design Team Roster

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Finding More Resources

The educational and corporate community has dozens of marvelous resources available for the motivated facilitator wishing to find more resources. Also, the practical wisdom of gifted community facilitators should be tapped. This guidebook has drawn upon several excellent resources and those are listed in the following reference list.

In the search for more resources consider human resources, written resources, technology-enhanced resources, organizational resources, and other resources. Identify excellent facilitators and interview them. Practical wisdom is often not written but accessible through stories. Utilize libraries to search for materials. Search for organizations that support facilitator growth and learning, like the National Facilitators Network (has state-based groups, too). Contact your local Cooperative Extension Service for information and coaching.

Consider searching for resources under the general heading of facilitation as well as under each of the sub-topics important to facilitation (conflict, decision-making processes, etc.). Remember that the context in which facilitation is done is important—in board rooms, in community meeting rooms, in group retreat settings, etc. Evaluate the resource to see if it is more appropriate in one context than another.

Best wishes finding more resources to build upon your skills, understanding, and expertise as a facilitator.

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- Volume 8. Designing a Volunteer Facilitation Program (BU-7436-S) _____ copies, at \$6.00 each: \$ _____

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