

Transcript | How to Be a Great Facilitator

1

00:00:10.670 --> 00:00:13.020

Callie Bradley: Hello, everyone!

2

00:00:13.150 --> 00:00:22.149

Callie Bradley: Welcome, welcome! You are in the right place, just gonna give a couple seconds for more people to join.

3

00:00:22.550 --> 00:00:23.920

Callie Bradley: Excellent

4

00:00:24.030 --> 00:00:42.809

Callie Bradley: Hello, and welcome to this Lightning Talk event, How to Be a Great Facilitator. My name is Callie, and I'm an event producer here at Apolitical. Today is all about learning the most important tips for great facilitation in just 17 minutes. Less time than a typical meeting.

5

00:00:43.160 --> 00:00:50.869

Callie Bradley: You'll hear an expert break down facilitation into its main components and explain how to achieve your objectives while ensuring everyone's voice is heard.

6

00:00:51.470 --> 00:00:55.000

Callie Bradley: For those of you who may be joining us for the first time, welcome.

7

00:00:55.200 --> 00:01:04.360

Callie Bradley: Apolitical is the world's largest online network for government, used by more than half a million public servants and policymakers across 170 countries.

8

00:01:04.910 --> 00:01:10.440

Callie Bradley: Apolitical is a strategic partner to governments, helping them prepare their workforces for the future.

9

00:01:10.760 --> 00:01:19.090

Callie Bradley: We achieve this by upscaling through short online courses and peer communities, as well as by building innovative learning tools designed for and with governments.

10

00:01:19.620 --> 00:01:28.539

Callie Bradley: It would be great to hear from all of you as well, so please do post in the chat where you're joining us from, and what organization you work for, if you're comfortable.

11

00:01:29.150 --> 00:01:42.049

Callie Bradley: Now, I'm just going to get into a few quick bits of housekeeping before we get into today's session. So, firstly, I'll mention that this event is recorded for on-demand viewing on the Apolitical website, so please don't record it yourself.

12

00:01:42.410 --> 00:01:54.829

Callie Bradley: We'll also be using the recording to generate event insights, including with AI-powered software. As the session is running on a Zoom webinar, we won't collect your video or audio data, but personal data you share in the chat may be captured.

13

00:01:54.840 --> 00:02:04.180

Callie Bradley: Contact details for privacy concerns are in the Apolitical homepage footer. Closed captions are available in your own language and can be toggled on or off in your screen settings.

14

00:02:04.290 --> 00:02:08.309

Callie Bradley: My colleague will post the instructions for that in the chat.

15

00:02:10.360 --> 00:02:23.760

Callie Bradley: And secondly, before we get started, I would love to introduce you to the life and government community on Apolitical. It's a space to connect with and learn from your peers in the public sector, whether you're new to government or a seasoned civil servant.

16

00:02:23.880 --> 00:02:38.579

Callie Bradley: My colleague will post the link to the community in the chat. And I'm just going to take a quick look at who we have in the virtual room today. Wow, lots of people. We have Brazil, Leeds, Virginia in the US, Ottawa.

17

00:02:38.580 --> 00:02:50.890

Callie Bradley: Malta, wow. Must have some beautiful weather there today, I can imagine. Birmingham, York, hello, everyone. Keep those introductions coming, we love to see where you are joining us from.

18

00:02:51.820 --> 00:02:59.470

Callie Bradley: And now I'm going to introduce today's speaker. We are fortunate to have a brilliant guest, Vince Verlaan, joining us today.

19

00:02:59.620 --> 00:03:16.029

Callie Bradley: Vince is an experienced designer and facilitator of highly interactive meetings, workshops, open houses, forums, conferences, online events, and processes that bring people together. He specializes in public participation, stakeholder consult... consultation, and engagement.

20

00:03:16.110 --> 00:03:27.050

Callie Bradley: He has worked in a wide range of sectors across Western Canada and internationally, and has worked with all levels of government, and has completed over 25 projects for or with Indigenous communities.

21

00:03:27.330 --> 00:03:33.729

Callie Bradley: You can read his full bio by visiting the Resources tab at the bottom of your Zoom screen and heading to the Speakers section.

22

00:03:33.920 --> 00:03:37.409

Callie Bradley: Welcome, Vince. It is lovely to have you here today.

23

00:03:38.370 --> 00:03:55.790

Callie Bradley: And alright, with that, I'm going to hand it over to you for the next 7 minutes, and then we're going to have a couple minutes reserved at the end for Q&A. So, attendees, submit your questions for Vince in the Q&A tab as soon as you have them. And Vince, I will hand it over to you to share your slides.

24

00:03:57.400 --> 00:04:02.929

Vince Verlaan: Thank you very much, Callie. It's nice to be with everyone. I'm going to now share my slides, and I hope it runs smoothly.

25

00:04:05.250 --> 00:04:24.130

Vince Verlaan: Okay, first of all, the title is How to Become a... or How to Be a Great Facilitator, and hopefully we cover a lot of ground quickly, but there are detailed notes in these slides which are being provided to you, so you don't have to take notes, you can just try to absorb the content to a certain degree as I whip through this.

26

00:04:24.130 --> 00:04:29.140

Vince Verlaan: And we'll see how it goes, but I look forward to future conversations as well.

27

00:04:29.730 --> 00:04:46.690

Vince Verlaan: So, while we're listening, while you're listening to the presentation, please reflect on the following question. Why do you actually want or need to facilitate with your team, with your organization, with your network? Take that as the question that you're going to be thinking about and chewing through as this content flows through.

28

00:04:47.900 --> 00:05:11.289

Vince Verlaan: So, I like to work with people to achieve great things that they couldn't achieve together, or alone, and that's the essence of facilitation. And it came from my career working in project management and being a coordinator, and learning that top-down management didn't work nearly as well as collaborative processes and engagement and facilitation models, and I've been doing that kind of work for about 30 years now, and the magic of group process generates

29

00:05:11.290 --> 00:05:16.349

Vince Verlaan: Solutions that no one else could come up with alone. That's the core promise of facilitation and engagement.

30

00:05:16.990 --> 00:05:30.040

Vince Verlaan: when I talk to you about being a great facilitator, I want you to reflect on the concept of painting a bedroom in your house. If you've ever done it, you know that 90% of the work is the ugly preparation part, moving up furniture, taping up things.

31

00:05:30.060 --> 00:05:37.719

Vince Verlaan: choosing paint, arguing with your spouse, those kinds of things. And the glorious part is the final step of rolling on the paint and seeing the results.

32

00:05:37.720 --> 00:05:50.810

Vince Verlaan: So picking a tool and running a workshop is the glorious part. Way before that, there's a lot of things you have to do right. So to be a great facilitator, I'm going to take you through the fundamentals, the back room, the backstory, not just the pretty tool.

33

00:05:51.470 --> 00:05:58.819

Vince Verlaan: So we're going to cover the why, the purpose, you know, Simon Sinek, start with why, some fundamentals of the practice, like building an effective agenda.

34

00:05:58.900 --> 00:06:15.820

Vince Verlaan: how participatory leadership is underlying all these tools, and then some key things a facilitator does. I'm going to skip the four key things slide, I don't have enough time. 7 minutes, and I'm going to try to present a top 10 list for you, and we're going to try to do it all without looking like this guy by the end of the session.

35

00:06:16.660 --> 00:06:35.139

Vince Verlaan: So, a facilitator is really someone who helps a group work together on an issue that matters to all of them. They focus the conversation, lead a worthwhile conclusion, balance participation, and generate shared insight that's recorded in action later. These definitions are available for you, but that's the key of it.

36

00:06:36.450 --> 00:06:49.520

Vince Verlaan: Engagement... engagement is a loop of external and internal discussions where facilitation is essential in all steps, and so you're facilitating collaboration throughout, over time, so we'll key on facilitation today.

37

00:06:49.950 --> 00:07:06.369

Vince Verlaan: But I want you to think about what a successful organization looks like, and the Rotman School of Business at U of Toronto has this model, and I quoted it here for reference. An organization must have a clear strategy, effective structure, and working systems, but at the heart of it.

38

00:07:08.090 --> 00:07:16.430

Vince Verlaan: Our people and culture. You work with your people is going to determine organizational success, and facilitation is part of that. That's how deep it goes.

39

00:07:17.000 --> 00:07:25.239

Vince Verlaan: Harvard Business Review recently printed a whole article on the soft skills of facilitation, how every team needs this capacity.

40

00:07:25.540 --> 00:07:44.659

Vince Verlaan: So did Forbes. I can send you those links. And here are the outcomes, why we do this, the benefits, generating new ideas for your issue or question, setting a clear direction together, getting agreement amongst and with your team, increasing your performance afterwards, and actually building capacity amongst your team and leadership and teamwork.

41

00:07:45.870 --> 00:07:52.240

Vince Verlaan: And again, it's more than just having a great workshop with lots of sticky notes and fun and games, which are great, but what's underneath it?

42

00:07:53.290 --> 00:08:01.270

Vince Verlaan: I've created this pyramid to show you that the tool and the format that you're choosing really rest at the top of what you need to know and do well.

43

00:08:01.300 --> 00:08:21.199

Vince Verlaan: And so, at the bottom is, what are the values around this kind of process and participatory model that you believe in? You believe people are good, and they're... you want to listen to them and include them, and then you have principles that follow that, laws that you follow in order to practice your core values, and then some practices of good facilitation, and then a technique at the top.

44

00:08:21.200 --> 00:08:25.939

Vince Verlaan: So you can come back to this another day, but this is the big picture of what you're actually trying to achieve.

45

00:08:27.450 --> 00:08:47.370

Vince Verlaan: There's a great book out there that talks about participatory decision-making and how facilitation is based on these four values. Full participation, mutual understanding, inclusive solutions, and shared responsibility for implementing what emerges. And this book, I'm going to describe it in a second, is what I consider the Bible of doing this work well.

46

00:08:47.870 --> 00:08:57.129

Vince Verlaan: The outcomes are enhanced personal learning, more effective groups, and sustainable agreements. Why wouldn't you want all of that in your team, your organization, your network?

47

00:08:57.640 --> 00:09:05.469

Vince Verlaan: And that's the book, Sam Kainer, second edition, The Facilitator's Guide to Participatory Decision Making. Very approachable, very accessible.

48

00:09:06.380 --> 00:09:23.030

Vince Verlaan: So, a facilitator is primarily a servant leader. It's not top-down leadership, it's working with and for a group to help them have a conversation, come to agreement, and or plan for the future, where the Facilitator is a trusted, neutral voice who helps shape and makes decisions about the process.

49

00:09:23.030 --> 00:09:31.140

Vince Verlaan: But the group develops and discusses and resolves the content issue. You have to step out of that role while you do control the process side.

50

00:09:32.000 --> 00:09:39.880

Vince Verlaan: The Facilitator is thus a gentle and supportive guide, helping the group have the discussion and help generate and come to agreement on a decision.

51

00:09:40.300 --> 00:09:57.649

Vince Verlaan: Of course, you need to build a logical, focused agenda. You need to have the purpose statement and the focus challenge at the top. You need to think through what amount of information sharing versus discussion versus ideation versus option development versus decision making should be built into the agenda.

52

00:09:57.900 --> 00:10:10.520

Vince Verlaan: you have to take them through all those steps, and you have to push through action planning and timing of those steps. So you have a lot of responsibilities, but it's the group that's responsible for developing the answers and moving forward together.

53

00:10:11.840 --> 00:10:24.569

Vince Verlaan: So I'm going to skip these four steps. This is a lecture for another day from Professor Verlaan. I do have a 3-day training course on this, a 1 day, a 4-hour, a 2-hour, and a 1 hour. This is 7 minutes. So I'm going to skip this deep dive.

54

00:10:24.720 --> 00:10:29.789

Vince Verlaan: Top 10 list of what a Facilitator does. Call them together around an issue or a key decision.

55

00:10:30.160 --> 00:10:31.920

Vince Verlaan: Shape the process.

56

00:10:32.130 --> 00:10:34.090

Vince Verlaan: Ensure the group follows it.

57

00:10:34.200 --> 00:10:45.670

Vince Verlaan: And keeps to it the agenda, keeps the focus on one activity until it's completed, manages the discussion, including drawing out people who might be quieter and use different techniques for that.

58

00:10:46.180 --> 00:10:50.880

Vince Verlaan: You actually have to limit people like me, who talk a lot sometimes, to get a balance in the room.

59

00:10:51.490 --> 00:10:54.280

Vince Verlaan: Summarizing and reflecting back key points.

60

00:10:54.550 --> 00:11:07.539

Vince Verlaan: Checking for agreement on options, testing for consensus and fixing and pausing if there isn't consensus, and then formalizing group decisions, confirming with the group, and even addressing conflict. So it's a lot of human skills.

61

00:11:07.780 --> 00:11:19.440

Vince Verlaan: matched by some mechanical process steps, including ensuring a written record is made of action points and decisions, so it can be implemented, or else you've wasted everyone's time bringing them together. None of us need that.

62

00:11:21.420 --> 00:11:32.600

Vince Verlaan: in terms of tools, there are hundreds and thousands. Don't get caught by one single format. Oh, we always have to do World Cafe, it's the best. It's great. It doesn't suit a lot of conditions. So...

63

00:11:32.600 --> 00:11:44.310

Vince Verlaan: All kinds of things are listed here. I'm going to argue that you want to have fun, you want to do a variety of formats, you want to get people moving, use their hands, their hearts, their guts, their brains, and mix it and get the richest results.

64

00:11:44.310 --> 00:11:54.720

Vince Verlaan: So try to make it interactive, try to have fun, try to accommodate people with special needs, and you can do it online, offline, hybrid, all at once, over time, lots of flexibility.

65

00:11:55.990 --> 00:12:02.299

Callie Bradley: Vince, I'm just gonna jump in here, and just ask if you are able to wrap it up quickly, so we have time for a couple questions.

66

00:12:03.960 --> 00:12:08.660

Vince Verlaan: Well, Callie, I can say yes to that, because this is my second last slide. It's almost like we planned this.

67

00:12:09.250 --> 00:12:18.669

Vince Verlaan: Okay, so here's the last slide, which is a link to my website, which I built out with a lot of resources that are kind of the cream of the crop of all the resources out there.

68

00:12:19.240 --> 00:12:24.329

Vince Verlaan: So, if you go to that link, you'll find some good stuff, and I'm always available to share what's out there.

69

00:12:26.110 --> 00:12:45.679

Vince Verlaan: And here's the slide where we get the pretty picture by AI, someone else made this, of what's possible with a well-facilitated group. I just want to make sure you understand it's the prep and the value system and the choices you make that are going to drive the success of your event and make that value proposition very strong for your internal team and externally.

70

00:12:45.700 --> 00:12:48.349

Vince Verlaan: Thanks very much, and I'm happy to answer any questions.

71

00:12:50.040 --> 00:13:00.830

Callie Bradley: Thanks so much, Vince. That was a brilliant presentation in just 7 minutes. Really, really useful. You can stop sharing your slides for now, and I'm just gonna pop a couple.

72

00:13:00.830 --> 00:13:20.709

Callie Bradley: Quick questions into our last couple minutes together. So, this one got a lot of upvotes. Someone is asking how to manage someone taking over the conversation and opening the conversation for others to enter the chat. So I guess the question here is, like, how do you manage someone who does take over the conversation and make room for other people?

73

00:13:20.990 --> 00:13:30.519

Vince Verlaan: Sure, so you plan for it, that's number one. I'm going to go back again and again, be ready for it. So, good question. And the way you're ready for it is two ways.

74

00:13:30.520 --> 00:13:43.889

Vince Verlaan: At the beginning of the session, you establish your role clearly. I'm the facilitator managing the time, managing our focus, managing the question. You are responsible for generating the solutions. I'm going to control process, you work on content.

75

00:13:43.890 --> 00:13:48.890

Vince Verlaan: And then you say, do I have your permission to play that role in support of the group?

76

00:13:49.030 --> 00:14:02.079

Vince Verlaan: You ask for permission. They all say, of course, of course. And then you sit... later you say, excuse me, I'm the facilitator, remember? So I'm going to call you back to the right question and the right agenda. So you actually have to have a bit of a spine.

77

00:14:02.080 --> 00:14:14.919

Vince Verlaan: And you have to push back on people occasionally. That's part of being a facilitator. And the positive thing is, you'll get feedback from other members in the room later. Thank you so much for keeping the boundaries and keeping us on time, and not letting

78

00:14:15.090 --> 00:14:16.799

Vince Verlaan: Joanne dominate, like...

79

00:14:16.920 --> 00:14:25.110

Vince Verlaan: I didn't like that, and I was shy, but you took care of it, thanks so much. So you're doing safety for others by being a bit directive, and that's part of the role.

80

00:14:28.420 --> 00:14:47.360

Callie Bradley: Awesome. Thanks so much, Vince. That's a great piece of advice, and we're just gonna do one more quick-fire question right now. So I guess I will pull up another upvoted question. What are your tips, maybe one or two quick tips for effective facilitation when you are put on the spot?

81

00:14:49.330 --> 00:14:51.090

Vince Verlaan: One is to say, I don't know.

82

00:14:51.770 --> 00:14:53.849

Vince Verlaan: Give me a minute to think about that.

83

00:14:54.460 --> 00:14:58.210

Vince Verlaan: What are your ideas? Because as a group, we're smarter than individually.

84

00:14:58.530 --> 00:15:02.540

Vince Verlaan: I've thought about that, and here's a couple options for you guys to consider.

85

00:15:02.780 --> 00:15:04.639

Vince Verlaan: Not do what I say.

86

00:15:04.790 --> 00:15:20.109

Vince Verlaan: because you're in that spirit of helpful servant to the group, and you're focusing on the group's experience, and if it's an individual who's being very antagonistic, you can sort of say, why don't we take that offline at the break? Because it's a bit of a tough issue, and I don't want to take the group offline. So it's about being ready for the

87

00:15:20.230 --> 00:15:33.730

Vince Verlaan: stuff that might come your way. And it takes a little bit of road, road wear to be comfortable with any situation, but you'll get there. Especially if you keep the intention of the session in mind. That's the primary reason you're there. Keep that focus.

88

00:15:35.180 --> 00:15:51.789

Callie Bradley: Great, thanks so much, Vince. And before we wrap up today, I just want to let everyone know that we have curated a great follow-on resource to today's topic that we think you will find useful, a resource list to master productive, inclusive, and enjoyable meetings.

89

00:15:51.980 --> 00:16:06.139

Callie Bradley: So, to receive your link to this list, go to the Life and Government community after the event, and leave a comment on the post pinned at the top of the page, and we will send you the resource by email after the event. My colleague is posting the link to that thread in the chat.

90

00:16:06.140 --> 00:16:21.680

Callie Bradley: And I see there have been some questions about receiving Vince's slides, so I'm just going to remind everyone that you can find those slides in the resources tab, and we will also link those on the event page after the event. So, lots of resources available to help you all become better facilitators.

91

00:16:21.960 --> 00:16:32.230

Callie Bradley: And thanks so much again, Vince. We've had some incredible wisdom from you today. I'd like to ask everyone to join me in giving Vince a virtual round of applause.

92

00:16:32.250 --> 00:16:45.999

Callie Bradley: I know that was a very short Q&A, so I just encourage you to continue the conversation in the life and government community after the event. And most importantly, I want to say thanks to you, the audience, for investing and learning and being so engaged in this topic.

93

00:16:46.300 --> 00:16:54.709

Callie Bradley: The team is going to pull up a quick poll to see how you felt about today, which will help us to continue improving our content. We really appreciate your responses.

94

00:16:55.130 --> 00:17:11.030

Callie Bradley: And before you go, while you're responding to that poll, I want to share a few more events that you can register for to join us again at soon. If you're not available to be there live, remember that you can always register for the event in order to get sent the recording to catch up whenever it suits you.

95

00:17:11.329 --> 00:17:21.669

Callie Bradley: So coming up next Tuesday, you can join us for Hacks for Cleaning Messy Data in Minutes, where you'll learn to address the highest impact errors so you can start your spreadsheet analysis sooner.

96

00:17:21.940 --> 00:17:33.550

Callie Bradley: And for the UK civil servants here, we have how to translate your work into strong examples coming up in August, part of our Career Move series, so you can apply for that new role that you have been eyeing.

97

00:17:34.140 --> 00:17:52.079

Callie Bradley: Alright, it is 3.17 on the dot, British Standard Time, British Summertime, that is all we have time for today. We hope you found it helpful, and we want to say a huge thank you to Vince, to everyone who's made today happen, and to you for taking time out of your busy days.

98

00:17:52.080 --> 00:18:01.050

Callie Bradley: Keep an eye out for the email coming your way with today's recording and resources, and we hope to see you at another Apolitical event very soon. Have a great day, goodbye.