

# FACILITATION

## STAFF & VOLUNTEER TIPSHEET



## How to use this document

*This tipsheet offers strategies and tools for facilitating conversations. It's helpful for people who are learning to lead discussions or for teaching new discussion leaders (even young ones) how to make a welcoming and inclusive environment.*

### Preparing to gather

#### Find out what participants need.

Ask participants in advance:

- What can I do to make the space accessible to you?
- What questions do you have?

#### Prepare your plan ahead of time. A good plan:

- Helps participants understand the plan and topic for the day
- Includes time to discuss group agreements
- Lets people join in different ways (small and big groups; talking, writing, and moving around)
- Builds in time for people to arrive, switch between activities, take breaks, deal with any tech problems, and wrap things up
- Mixes up activities that need more or less energy to keep people interested

**Prepare materials ahead of time.** If you need paper, markers, or anything else, make sure it's all set.

**Share your plan and slides ahead of time.** This helps people who are shy or have disabilities.

**Think about how to support the group.** Ask yourself "what if..." questions (like "What if they're quiet?" or "What if a few people talk a lot?"). Then, think about how to handle it.

**Set up the room.** Discussions often work best when everyone sits in a circle without tables. When you plan activities, book the room, and order food, think about any access needs people might have.



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## Starting out

### Introductions

- **Welcome everyone** and **thank them** for coming.
- If the meeting is in person, tell participants where the **bathrooms and water** are.
- **Summarize the plan** for the meeting and ask if they have any **questions**.

### Icebreakers

Icebreakers are **useful at the beginning** to help people **feel more comfortable and included**. There are many icebreakers online!

Here are some things to think about:

- Some people might not like icebreakers that need them to act extroverted (being loud, dancing) and **prefer sharing with a neighbor or journaling**.
- Icebreaker activities that are **physical may not work** for some people.
- Choose an icebreaker that **fits who's in your group** and **what you're doing**.

### Recording input

Identify a note-taker in advance or take notes while facilitating on a whiteboard or big paper. Photograph and share your notes afterwards.

## Group agreements

Group agreements are **rules we all agree on** to make spaces **as safe and effective as possible**. You can create them before or during the session.

Here are some ideas:

- **Be as present as you can**. Avoid using devices and having side conversations when possible.
- **Respect multiple truths**. Recognize that different people have different experiences.
- **Recognize intent vs. impact**. Even if you mean well, what you do can still hurt someone.
- **Support everyone's participation**. If you usually talk a lot, encourage others to share.
- **Listen to learn, rather than respond**. Reflect on what others are saying before responding.
- **Notice your assumptions and reactions**. Pause. If you feel a knee-jerk reaction, use it as a sign to slow down.
- **Take responsibility for your actions and learning**. Speak to what you know and apologize when you need to.
- **Practice confidentiality**. Keep what's shared in the discussion private.



## Guiding the discussion

As a facilitator, your job is to make sure everyone is **involved, learning, and connecting**. This means paying close attention to what is happening!

Using your observation skills, you **guide the conversation** to make sure that **everyone participates, follows group agreements, stays energized, and ends on time**.

## Maintaining group agreements

People can do hurtful things in group discussions, often without realizing it. They might interrupt, dismiss or assume other people's experiences, or treat individuals as representatives of their whole identity group.

It's important to prepare for these moments:

- **If someone does not follow the agreements**, gently remind them.
- **If someone might have been hurt**, check in with them privately and ask how you might support them.
- **Talk to the person who caused harm**, listen to their side, and help them understand.
- **Check back in with the person who was hurt** to see how they're doing.

## Balancing participation

Facilitators should make sure that **everyone has a chance to share**. You can **track participants' identities** (e.g. gender, race, age, language) and **personalities** (e.g. introverted vs. extroverted) to **notice patterns** about who is more or less vocal in discussions. This can help you identify whose voices to support in the space.

To **help quieter people and groups speak up**:

- **One minute of silence**. Quiet reflection can help people collect their thoughts and say what they think.
- **Reflect and share**. Ask people to quietly think or journal about a successful discussion they've been a part of. Then, invite them to share their thoughts in the

group. What made it so successful?

- **Agree/disagree walk**. The facilitator shares a low-stakes opinion ("apples are better than oranges"). Those who agree move to one side of the room, and those who disagree move to the other side. Follow the walk with discussion about what they think.

To help **balance groups where a few individuals tend to speak more often**:

- **Invite quieter members to share**. Say that you want to hear from people who haven't shared as much yet.
- **Invite a pause**. Invite all participants who are quick to respond to hold a 10-second pause before speaking.
- **Check in**. If someone is still speaking a lot, pull them aside at a break and ask them to help encourage others to speak up.

## Supporting group energy

Keep an eye on the group's energy levels. It's normal for the energy to drop if the facilitators are doing a lot of the talking.

If you notice a drop in the group's energy:

- Change to a smaller group activity to **get more people talking**.
- Do something **physically active** to wake people up.

## Managing time

Facilitators should also try to keep things more or less on time:

- **Set expectations** about how long activities should take. For example, you can invite a "brief, one-sentence introduction" or a "one-word check-in" from every person or ask for "one last comment" to keep things moving.
- **Be ready to adjust your timing**. Have an idea of which activities you're prepared to skip. It can help to have activities in your "back pocket" in case of technical difficulties or extra time.



## Facilitating activities

Do your best to keep discussions interesting for everyone. This section includes some strategies!

### Exploring ideas

- **1-2-4-All.** Each person thinks about a question by themselves. Then, they pair up to talk about it. After that, groups of four discuss, and finally, each group of four shares with the whole group.
- **Posting ideas on index cards.** Participants write down their thoughts on cards and organize them into categories. This helps show how different ideas fit together.
- **Self-recording or photos.** To start a discussion, people can respond to a prompt with photos, videos, or voice recordings.
- **Draw a flowchart or diagram.** Draw out ideas on big paper or a whiteboard. This can help people understand complex topics.
- **Thought wall.** To encourage new discussions, ask people to write their questions or ideas on posters or whiteboards in different parts of the room. Then, invite participants to move around and write responses to one another.
- **Virtual whiteboards.** Use online tools like Padlet or Jamboard to collect ideas.
- **Scenarios.** Bring out new ideas by talking about or acting out pre-written situations.



into small groups, give clear instructions and make them visible at all times. Make sure everyone knows what to discuss, how much time they have, and what to report back.

- **Making groups.** When creating small groups, pay attention to identity and dynamics to ensure people work well together.
- **Pre-assigning roles.** You may want to pre-assign roles (e.g., timekeeper, notetaker, reporter, facilitator) to different group participants to save time.
- **Provide time checks.** Give time checks throughout to help ensure that everyone has a chance to share.
- **Report-outs by main idea.** When coming back together as a large group, ask each small group to share 1-3 key points to keep the conversation focused.

### Assessing feelings and opinions

- **Mood board.** Participants show how they feel by adding pictures or words to a board.
- **Surveys.** People can share their opinions through paper or online surveys.
- **Continuum activity.** People position themselves on an imaginary line on the floor (from “strongly agree” to “strongly disagree”) to show how they feel about a topic.
- **Thumb-ometer.** Participants can put their thumbs up, down, or sideways to show agreement or disagreement. Neutral topics (“Should we take a break now?”) help you avoid singling anyone out about a sensitive issue.
- **Word cloud.** Websites like Mentimeter collect participants’ one-word descriptions of their feelings to display common themes.

### Small-group discussions

- **Structured discussion.** Open-ended questions let small groups dive deeper into topics. Limit the number and scope of the questions so participants have enough time to discuss.
- **Clear instructions.** When sending participants

## Facilitating activities, continued

### Decision-making

- **Dot voting.** Write options on big paper and give each participant the same number of dot stickers. Participants vote by sticking their dots next to one or more options. Participants can vote with all of their dots on one option or split them between several options.
- **Vote with your feet.** Assign options to different parts of the room. Then, invite participants to move to a part of the room to show their choice.
- **Off-line.** If a decision only involves a few members of the group, suggest continuing the conversation outside of the gathering.

### Closing

#### Recap

If you have time, you can **briefly review what you accomplished together** during the day and thank everyone who helped make it happen.

#### Last words

Make sure to make space to **hear from everyone one last time**. This can help participants feel included and reflect on what they learned. Here are some ways to end the session.

Each participant shares...

- one word or phrase about how they're feeling.
- one thing they learned.
- one skill they want to practice.
- one challenge they want to work on.
- one thing they appreciated.

#### Feedback

You can also **ask participants to tell you what they thought of the session!**

Here are some ways to do this:

- have participants fill out a short survey
- take notes on a flip chart as participants share what went well and what could go better next time



### ABOUT THESE RECOMMENDATIONS

*This information was developed through UW-Madison Extension's Curriculum Jams process. Curriculum Jams bring together people with lived experience to review and recommend learning resources.*

*Check out our website to learn more!*  
[youthdevelopment.extension.wisc.edu/curriculum-jams](https://youthdevelopment.extension.wisc.edu/curriculum-jams)



#### REFERENCES:

<https://www.acf.hhs.gov/sites/default/files/documents/opre/Strengthening-Facilitation-Skills-Trainer-Guide.pdf>

[https://coregroup.org/wp-content/uploads/media-backup/documents/Resources/Tools/Participatory\\_Facilitation\\_Techniques\\_Workshop\\_Curriculum.pdf](https://coregroup.org/wp-content/uploads/media-backup/documents/Resources/Tools/Participatory_Facilitation_Techniques_Workshop_Curriculum.pdf)

<https://www.streetgames.org/wp-content/uploads/2023/04/Youth-Voice-Toolkit-v2-print.pdf>

Images courtesy of National 4-H Council Flickr collection and the Wisconsin Photo Library.

# FACILITATION TRAINING

## TEACHING RESOURCES

The **Freechild Youth Engagement Workshop Guide** includes interactive workshops that help youth-adult teams work together better.

**Format:**

- introduction and 23 guided workshops
- includes additional activities and resources

**Audience:**

- Grades 8+

**Source:** Freechild Institute for Youth Engagement



<https://youthdevelopment.extension.wisc.edu/resources/the-freechild-youth-engagement-workshop-guide/>

*These resources have been recommended through the Curriculum Jams process for training youth as facilitators.*

The **Participatory Facilitation Techniques Workshop Curriculum** teaches practices for generating ideas and managing meetings which can be used for facilitator training.

**Format:**

- 3.5 hr workshop

**Audience:**

- Unspecified, assumes facilitation skills

**Recommended:** Pages 13-15, 18-22

**Source:** USAID, FSN Network, CoreGroup

<https://youthdevelopment.extension.wisc.edu/resources/participatory-facilitation-techniques-workshop-curriculum/>



Participatory Facilitation Techniques Workshop Curriculum

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## BACKGROUND RESOURCES

*These resources have been recommended through the Curriculum Jams process for developing background knowledge about facilitation.*

**Icebreakers for Youth-Led Student Clubs** is a list of over 50 icebreakers that helps groups learn names, explore identity, get to know each other, check in, and develop teamwork skills.

**Format:**

- list available with free sign-up

**Audience:**

- youth and adults

**Source:** Youth Celebrate Diversity

<https://ycdiversity.org/resources/guides/icebreakers-for-youth-led-student-clubs/>



Icebreakers for Youth-Led Student Clubs



**The Youth Voice Toolkit** includes descriptions of activities that can engage youth to share their voices in facilitated groups.

**Format:**

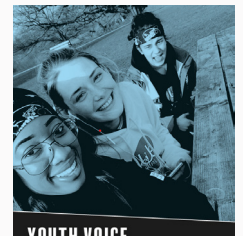
- guide includes descriptions of different youth engagement activities

**Audience:**

- youth and adults

**Source:** Street Games

<https://www.streetgames.org/wp-content/uploads/2023/04/Youth-Voice-Toolkit-v2->



YOUTH VOICE  
IDEAS  
TIPS &  
TOOLS



**Group Facilitation and Problem-Solving** is a chapter in the Community Tool Box that covers how to conduct effective meetings, developing facilitation skills, capturing what people say, and leading group discussions.

**Format:**

- online guide organized by topics and sub-topics

**Audience:**

- youth and adults

**Source:** University of Kansas Center for Community Health and Development

<https://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation>



**Story Circles: A powerful engagement technique** explains the story circles method for engaging community dialogues. Story circles get people sharing diverse perspectives on an idea or question.

**Format:**

- article with step-by-step instructions, guidelines, and prompts

**Audience:**

- youth and adults

**Source:** University of Kentucky Cooperative Extension

<https://tinyurl.com/story-circles-uk>



Story Circles: A powerful engagement technique

