

Introduction to Facilitation

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Conversation

Expectations and Hopes

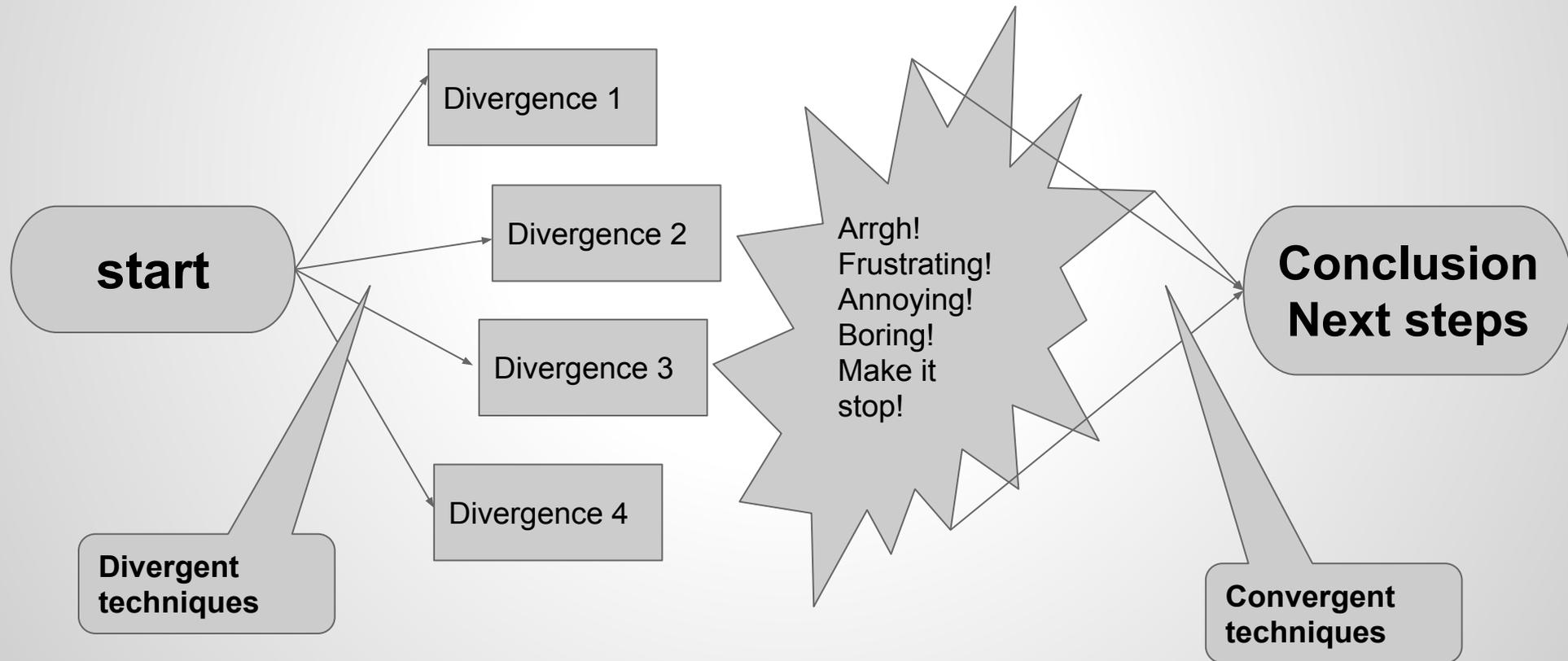
Agenda

Principle: teach some concrete things well rather than cover "everything" briefly

- Group conversations and how they fail
- Goals of facilitation
- Offline vs. online conversations
- Three conversation types in decision-making
- Facilitation techniques + practical practice
- Lunch!

Group conversations

- "two people, three opinions"
- divergent vs. convergent techniques



If only it were this easy...

Divergent vs. Convergent Techniques

Divergent

- free, open discussion
- No-judgment
creative, generative
thinking
("brainstorming")
- increasing diversity
via deliberate
questions
- Ignoring constraints

Convergent

- Nutshelling /
summarizing
- categorizing and
bucketing
- evaluating against
reality, constraints
- Judging and prioritizing
alternatives

Why do conversations fail?

"All human communication fails, except by accident" -- Prof. Osmo A. Wiio [[Wiio's Laws]]

- Humans! *shakes fist*
- People want to express themselves; sometimes feel misunderstood; repeat.
- Others want closure; impatience; annoyance
- Others confused; lost; distracted
- **so:** expect group conversations to include frustration, confusion; they are the price.

Goals of Facilitation

- (Lat. facilis) Help groups achieve their best potential through communication; *ease* their work
- encourage:
 - **full participation**
 - **mutual understanding**
 - **inclusive solutions**
 - **shared ownership**
- help groups through (inevitable) tension and conflict
- Who is the facilitator working for?

Offline vs. online conversations

- **offline skills largely applicable to online conversations**
- **main differences:**
 - online conversations are mostly non-real time; wiki conversations, in particular, are not (blessing and curse)
 - Online conversations offer fewer signals to go on -- tone, body language -- facilitation more challenging

Three communication situations in decision-making

- **Type 1:** unidirectional; announcements; FYI
- **Type 2:** consultative; initial topic/question; input given by group for later, separate decision-making by individuals in authority
- **Type 3:** deliberative/collaborative; group discussion; group decision
- How do these apply to the wiki?
- What is the **default** decision type on-wiki?
- Framing makes a difference

Facilitation Techniques

Facilitation techniques

- Listening techniques
- Participation techniques
- Progress techniques
- Facilitating with a POV
- Lists and categories
- Alternatives to open discussion

Listening techniques

- Paraphrasing and mirroring
- Follow-up
- Linking and inviting re-statements; naming individuals
- Acknowledging and naming feelings
- Legitimizing differences

Remember you are acting on behalf of the entire group.

Listening Exercise

"Should Wikipedia be more like a social network?"

Participation techniques

- Gathering ideas / perspectives
- Balance / Devil's advocate / rebalance
- Invitation; make space for quiet ones
- Flipcharts as engagers

Participation Exercise

"How should we respond to government attempts at censorship of content on Wikipedia?"

Progress techniques

- queueing as engagers
 - interrupting the queue
- tracks / demultiplexing
- identifying common ground, and diffs
- summarizing, refocusing (suggest!)
- using the clock
- lists, categories -- predefined vs. Metaphysics

Progress Exercise

"If we had to, what sister projects would you have WMF close down and why?"

or

"What new sister projects should WMF consider, and why?"

Facilitating chaos and despair

someone's gotta do it...

Facilitating chaos and despair

- the main goal: help the group develop shared understanding
- use all your listening skills; use participation skills to help the group listen to each other
- renew energy by switching formats; pick a fresh one

Chaos and despair: Useful formats

- systematically explore individual perspectives, with time discipline and Q&A
 - the goal is understanding; not resolving differences; stop argumentativeness cold.
- "If I were you"
- "Name a useful question to ask everyone"
- Facts vs. Opinions exercise
- "If I could remove one constraint" / "change one thing" ...
- ...

Facilitating with a point of view

- Acknowledge your hats
- State your position briefly
- Facilitate for a while
- Participate again
- make switches obvious and explicit

Alternatives to Open Discussion

N hours of open discussion can be exhausting
"Variety is the spice of life" -- William Cowper

Variety => Energy => Engagement => Progress

Alternatives to Open Discussion: plenum

- structured go-arounds
- Formal [to varying degrees] debates
- [Fishbowl session](#)
- ...

Alternatives to Open Discussion: groups

- working groups; rotating groups
- individual writing exercises
- role-playing
- [world café](#) (working groups + doodling)
- Framing is key:
 - state purpose
 - organize participants (wait for noise to end)
 - summarize process, roles, rules
 - note the time allotted
 - debrief at end (reunite as plenum; expose diversity), asking "what are you noticing?", "Have you heard anything new or surprising?", "what concerns you?"

Designing Effective Sessions

the alternative is hoping sessions are
magically effective...

Remember:

Topics \neq Process

Effective sessions

- get clarity on topics, and on goals (per topic)
- imagine desired outcomes (what would achieving the session goal yield?)
- select formats that are a good fit for the group and the outcomes needed, and plan the session's progress,
 - e.g. 1. brainstorm; 2. prioritization; 3. breakout groups; 4. debrief and open discussion; 5. decisions and next steps
- allocate time (be realistic)
- ideally, share this planning work with the group, in advance, and invite participation.

Dealing with Difficult Dynamics

There always is one...
(only one, if you're lucky...)

Dealing with difficult dynamics

- Do you know that person who...
 - ...repeats his own and others' ideas?
 - ...speaks with uncomfortably strong emotion?
 - ...or too loudly?
 - ...apologizes for everything they say?
 - ...nitpicks every analogy?
 - ...whispers or passes notes while someone is talking?
 - ...disguises disagreement with sugar-coating
 - ...raises a pet issue no matter what is being discussed?
 - ...is always insufferably smug and self-assured?
 - ...

Dealing with difficult dynamics

- Resist dampening of thinking in public
 - "you're repeating yourself"; "you're rambling"; "that's crazy"; "keep it simple!"; "stop wasting time"
- Instead, encourage thinking:
 - "take your time"; "that must have felt bad"; "interesting!"; "hold on, I think she's making an important point!", ...
- switch format (to more structure; to smaller audience; to meta-discussion)
- Amplify the weak; moderate the strong
- If you have the power to exclude, use it sparingly, only on the basis of clear rules of conduct, and only after at least one clear, explicit warning

Highly Recommended Reading

*Facilitator's Guide to Participatory
Decision-Making*

by Sam Kaner et al., ISBN 1118404955

Thanks for listening!

Have you learned something?

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