



TOOLS FOR CITIZENS

FACILITATOR'S GUIDE

HOW TO WORK
WITH THE TOOLBOX IN YOUR TEAM

2nd edition | 2019

Operated by

MitOst

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COMM'ON

socius



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How to Work with the Toolbox in your Team

1 Preparation Meeting with your Team:

This Toolbox focusses on a number of relevant themes for developing your organization, the work in your team and with your community. In order to prioritize which theme(s) to work on, get together in your team to assess your current collaboration and performance.

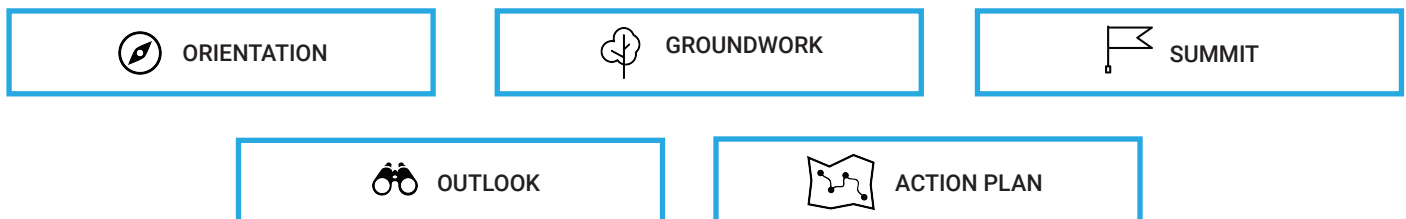
The **Method Card: Determining a Development Priority (01)** helps you talk about the strengths and weaknesses of your organization or team and indicates issues for development.

* After choosing a focal topic for the workshop, it is helpful to form a preparation group comprising 2-3 people that are trusted and competent to prepare and facilitate or host the session.

2 Preparing a Path:

For each theme, the Toolbox offers a **Path**, which provides a recommended sequence of activities, discussions, and exercises that will guide you through a fruitful learning process.

The Paths start with an **Orientation** (a first focus on the theme), followed by some **Groundwork** (deeper problem analysis), a **Summit** section (the development of new practices), an **Outlook** (dealing with the consequences of development) and finally an **Action Plan** session (anchoring the agreements and follow up tasks that result from the workshop).



Time:

Most Path Outlines assume that you will invest a full day to work on the respective theme. In some partnerships, especially with highly charged stakeholders, this kind of time investment is not possible. In this case, the preparation group needs to chop this workshop into two or three shorter meetings of 2-3 hours. These shorter meetings ideally would occur in sequence.

HOW TO PREPARE YOUR PATH:

- STEP 1** IN YOUR PREPARATION GROUP:
 Review the [results of the preparation meeting](#). Share your impressions of the resulting discussions and assessments and define the key objectives for your workshop.
 What outcomes would you like to get from this workshop? What exactly should be changed for the better?
- STEP 2** Download the [Path](#) which fits to your chosen theme from the Toolbox library. Carefully review the suggested Path for your theme and the related Method Cards and materials.



HOW TO PREPARE YOUR PATH:

- STEP 3** Discuss whether this Path will be helpful for achieving the objective you defined or whether you will need to adapt it. Feel free to throw out or add individual steps and methods. Have a look into the Toolbox library, if you want to add another method. Make sure that you realistically assess how much you can do in one day. The times mentioned in the tools and Paths assume that you work with a group of 7-15 people on average. Please adapt the times according to the actual size of the group.
- STEP 4** Most Paths invite you to delve into deeper levels and explore your values and principles of operation. If you feel that this is too much or too risky without external facilitation, feel free to stay closer to the surface of concrete structures and practices.
- STEP 5** Once the workshop outline is finalized, do a quick run-through to get a feeling for how the steps flow together.
- STEP 6** Continue with organizing details for your workshop.

3 Organizing Details for Your Workshop

Assigning Roles:




Assign within your team a **facilitator / host** for the workshop! It can be helpful if this person is *not* from the leadership of the organization, so that there are clear roles of facilitator and participants (of course, the facilitation can also rotate).

It is important to note that a **facilitation role** implies **responsibility for the process**, not for the outcome. Your task as a facilitator is to **propose methods** and **ensure good communication**, not to push content.

If you do want to contribute to the discussion from a team member perspective, make the role switch transparent (e.g. "I put myself on the speakers list and make the following statement as a colleague").

During the workshop, **use the Path Canvas** provided in the Toolbox as a **flip chart protocol** outline to keep track of your workshop results. For the protocol, **focus on outcomes** rather than full documentation of everything that is said. For this, **assign to somebody the role of Canvas editor** to make sure you document your results.

Also, it might be helpful to distribute some additional more funny roles:

-  an **Energizer** (person who suggests energizers when the concentration or energy is low),
-  a **Time keeper** (to watch the time and breaks) and
-  a **Fresh air keeper** (who opens the window if fresh air is needed).

Choosing the Setting:

Plan your workshop at a place that is **out of the norm for your team** (find a friendly, light filled room, preferably not your workspace).

If possible, **have a flip chart and a pin board ready** and make sure there is space to hang the documentation. In many cases a circle of chairs without a central table can facilitate an atmosphere of open discussion.

If you want volunteers to participate, **pick a time that is outside of regular working hours**.



Make sure there is tea and coffee and some small snacks to **make people feel comfortable!**



Inviting the Right People:

Each Path description indicates **who**, optimally, **should be involved** in the workshop.

Generally, groups of 7-15 people are perfect for capacity building workshops. If the number is smaller, sometimes a diversity of perspectives might be missing. If the group is bigger, it is more difficult to ensure everyone's involvement and an effective process dynamic.

Make sure everyone invited **receives the agenda** and possibly **a task to prepare** before the workshop.

Don't get bogged down in the problem-talk. Instead, **highlight the hopes and opportunities** of this development process. Invite your team to embark on an exciting journey!

Your **attitude and approach** can help maintain the focus on the positive aspects of the exercise.

Prepare the Facilitation:

Read through the **Tips and Methods** for Facilitation.

Last but not least:

Enjoy your Toolbox workshop!

4 Tips and Methods for Facilitation

Facilitating a Discussion:

It is helpful to decide how you discuss and make decisions before starting the workshop.

Ask people to **raise** their **hands** when they wish to speak. Note the names down on a list and call them to **speak in order**.

When people are speaking too long, you can introduce a time limit (e.g. 2 minutes per contribution). If individual people dominate the discussion, you can also **introduce a round or a limitation on contributions** (e.g. "match discussion": Each person is given the same number of matches. Every time someone speaks s/he gives up a match. When someone has used all their matches they may not speak again until everyone else's matches are gone too).

Collecting and Clustering Options:

The following collection compiles the most common methods for collecting and evaluating options in teams (Metaplan method).

Collecting Options	The guiding question of the session is presented and explained (best in written form). Participants individually write their answers on moderation cards (one answer per card, maximum 2 lines).
Clustering Options	The cards are presented and placed on a pin board or distributed on the ground. The facilitator takes the first card and places it on an empty place on the pin board/ground. Then s/he places the second card next to it if it fits thematically, otherwise the facilitator puts it on another empty space on the board/ground. Usually the author of the card decides on its position. Step by step, a landscape of thematic card groups (clusters) comes into existence. When all the cards are clustered, the individual groups /clusters are given titles.
Prioritizing Options	Participants receive a number of points (stickers or marker dots) which they distribute on their favorite clusters. The 2-3 options with the most points are selected for further analysis / refinement in the process.

Go-Round:

Go-Rounds are a good way of [equalizing participation and giving everyone a clear space to express](#) their opinion. In a Go-Round, everyone takes a turn to briefly speak on a subject or question without interruption or comment from other people.

The Go-Round can also be facilitated with a [talking piece](#), an object symbolizing the privilege to speak which is passed on from speaker to speaker.

Circle Practice:

The Circle is a dialogue practice that allows a group to [connect with focus, engage in deep listening, and think together in a manner that supports equality and intimacy](#). The Circle practice follows three principles: Leadership rotates among all circle members; responsibility is shared for the quality of experience; reliance is on wholeness, rather than on any personal agenda. For more details see [Method Card: Circle Practice to Engage in Focused Dialogue \(47\)](#).

Brainstorming:

Brainstorming (also: Ideastorming) is a tool for [creative thinking and gathering a large number of ideas](#) in a group. Clearly state the question or problem and ask people to call out their ideas, which will be noted in a list on the flipchart. [All ideas, even crazy and impossible ones, are welcome](#) in this phase! It is not about criticizing or reasoning yet. In the second step, ideas can be checked and evaluated to choose which ones the group wishes to explore further.

Small Group Work:

Small group work is a way to [energize](#) groups, to give the opportunity for everyone to [reconnect](#) and be [involved, to focus and generate new creative angles](#), or to [create a space for personal sharing](#).

When splitting the group up, you can choose to discuss different issues in each subgroup (a way to cover more content in short time) or have every subgroup deal with the same issue (in order to compare outcomes). You can randomly split participants up (e.g. by counting off or by lottery), assign them according to criteria such as expertise, or have them select their group by thematic preference. The question to be worked on in the small group and the time available should be written clearly on a flipchart or handout for each group. It can be helpful to even design a template flipchart for the documentation of the group work.

When sharing group results back in the plenum, make sure the groups [report only the relevant outcomes](#), not the entire working process (which can become tiring when you have several groups).

Triads:

Triads is a tool which can be used in a variety of contexts, with a variety of groups, and for a variety of purposes based on the process. It is a very simple structure that allows for [deep listening, sharing, and space for ideas and understandings to emerge](#). The basic structure of the Triads is having one or two questions that each person will speak to, e.g. if using Triads as part of reflecting, 'What are you learning about your own practice through this project?' or 'What is your key learning from what has not been successful?' For more details see [Method Card: Triads \(58\)](#).

Parking Space:

The Parking Space is a flip chart that serves as a list of all open issues that come up along the way. Using a Parking Space ensures [all ideas get recorded](#) and [participants don't feel like they've been ignored](#).

Whenever anything comes up that's not relevant to the discussion at hand, "park" it in the Parking Space. The issues can then be addressed at a later stage.



When Meetings Get Hot:

When people are working with passion, discussions can get heated and conflict can loom around every corner. In this case, the facilitator needs to step in and **offer a more controlled communication framework**.

One such example is the **controlled dialogue** format, in which two parties engage in a discussion where each side is invited to give their account, and then each party repeats and summarizes the points made by the other before giving their responding arguments. If the conflict is anchored on the personal level and not related to the group, you can ask the involved persons to clear it up among themselves outside of the team workshop.

If the conflict has structural dimensions that involve everyone, take a break and consider if you can handle it without external support, or if you want to involve mediation or outside facilitation to deal with it.

Exercises to Start Workshops:

It is helpful to start your workshop with a Check in to arrive together at the meeting.

Check in is a short round of personal introductions and sharing of how people arrive to the meeting – make sure people don't talk at length about their organizations in this step yet. As a host, prepare a Check in question such as "How do you arrive to this meeting today?" or "What moves you today?"

You can also start with a round of everyone **sharing** one of the aspects below:



- 1 something exciting that happened to them recently
- 2 the personal feelings they bring to the workshop
- 3 expectations and wishes regarding the topic
- 4 a moment of silence

or with a **Warm Up** such as:



- 1 stretching or yoga exercise
- 2 music and dance
- 3 a mini sculpture in which you express for example your expectations
- 4 an energizer game

Inspiration by www.seedsforchange.org.uk

5 A Word on the Do It Yourself Approach

The DIY approach has many charms and advantages: **it is flexible and light, it builds competence and self-reliance rather than dependency on experts and outside professionals, and it certainly saves some of your budget**. Furthermore, most development happens in a self-organized way anyway. At the same time, there are good reasons to involve external facilitation and support in development processes.

Toolbox workshops are about change and will not always allow you to stay in the Comfort Zone. Beyond the **Comfort Zone** lies the **Stretch Zone**. This is where you want to get to: **the space where change happens in terms of learning and development**. But beyond the Stretch Zone lies the **Panic Zone**. This is certainly **not where you want to be**. This is where **unhealthy things happen that block learning and development and can harm people and relationships**.



When should you abandon the DIY approach and seek help?

- ✓ When one or more persons are feeling highly uncomfortable or unsafe to speak up in the group.
- ✓ When people are feeling offended, conflict is played out by blaming and accusations.
- ✓ When the group feels persistently frustrated and stuck; discussions are moving around the same issues without progress.
- ✓ When the discussion is unbalanced and you are not able to include everyone due to persistent dominance of individuals (facilitated by age, experience, gender, or other criteria).

If you decide to seek external support, you can ask experienced colleagues and partners or professional consultants and facilitators for help. In this case, the Paths and methods of this Toolbox may still be followed.