

## Best Practices for Building a Facilitated Discussion (or Discussions)

- Articulate a disputable, specific purpose for gathering
  - The purpose focuses upon *why* you are calling the gathering-- what prompted it.
  - Good: “We struggle to collaborate when facing an external deadline.”
  - Bad: “We need to meet our deadlines.”
- Articulate the desired outcome in neutral terms
  - A facilitation outcome differs from its purpose. It is focused on *process* expectations.
  - Good: “All participants will have an opportunity to reach consensus on developing agendas.”
  - Bad: “X will agree to stay on topic during meetings.”
- Choose a facilitator or facilitators carefully
  - Facilitators should be able to establish and maintain all participants’ trust.
  - Facilitators should be good at asking probing, neutral questions.
- Set facilitators up for success
  - Protect their neutrality-- even from yourself.
  - Ask them to identify the tools they need.
  - Give them an opportunity to speak privately with participants in advance, if desired.
- Be thoughtful and transparent about who participates in accordance with your purpose
  - Determine who you want to participate and why.
  - Determine who should *not* participate and articulate a reason why.
  - Invite participants well.
- Establish and validate safety mechanisms with participants
  - Give participants an “opt out” option, ideally beforehand or through the facilitator.
  - Respect confidentiality.
- Be sure participants consent to the process and to the facilitator
  - Discuss the process in advance.
  - If a decision is a desired outcome of the facilitation, establish a decision-making methodology (e.g., facilitator confirms consensus, supermajority vote, majority vote, etc.) and share it.
- Be clear about how the results will be reported in advance and share with participants