

Method Card

Planning with facilitation notes

Design a process to achieve objectives

If you don't enjoy creating the process, imagine what it will be like to experience it...

IU/PHF Next Practice, RSA BF Room, 20th May and 21st May
Page 1 of 4

ProMeetTM
Productive meetings at work

Overarching objective:

To use ambition and experience in the room to achieve breakthrough thinking in the future of learning

Timing	Session Name	Facilitation Objectives	Notes
8:00	Set Up	To set the room up in the best way to support the workshop objectives	- Check we can get access at 8am? - Instruct RSA to set out 2 concentric circles of chairs - We will need free standing boards (c 2 m long) - Check we can leave set up for day 2
9:30	Arrival: Tea and coffee	For participants to feel welcomed, and ready to work: FOR US to facilitate networks to GENERATE ENERGY	
10:00	Welcome and Workshop objectives (DP to do welcome and run through objectives, SB to take facilitation baton from there onwards)	For participants to understand the objectives of the workshop	Workshop Objectives 1. To create outline designs for (radically) new learning arrangements seeking to achieve a step change in learner engagement and integration 2. To understand the pathway by which outline designs might be trialled Offer the objectives, and take questions for clarification on the objectives
10:10	Horizon Scanning Conversations	For participants to understand the 'cutting edge of current practice' as the boundary through which they must push	Participants briefed ahead of the workshop that they will be expected to discuss two of the HS examples

Example facilitation notes taken from a meeting seeking breakthrough thinking in the future of learning.

MEETING METHOD CARD

Facilitation notes/ Process design

DESCRIPTION

Facilitation notes are the participant centred, meeting process designed to achieve the stated objectives. They are the facilitators guide to the meeting.

Particularly important for longer, well attended meetings, they are the place to organise your preparation ahead of the meeting, and allocate time to ensure each objective will be met.

A good process design uses the principles of meeting excellence to get: participation right from the outset, high participant energy by changing the rhythm of the meeting, diversity of opinion, more work done by focusing on what really matters and achieves the stated objectives.

HOW?

1. Having already invested time ahead of the meeting in getting really clear on the meeting objectives, you are now ready to design the process.
2. Use the facilitation note template (word document) to break each part of the meeting process down into it different sessions.
3. Begin by stating the meeting objective in the (red) header box, and ensure all parts of the meeting are there to serve this objective.
4. Pay particular attention to the facilitation objectives section. Use this as the section to be clear what you want the participants to experience, think and do.
5. Use the notes section to help you remember specific data, or guidance notes to help you run the process with ease.
6. You can use the facilitation notes ahead of important meetings to ensure key people are in accord with the objectives and process.

Finally, remember that when in the meeting, be prepared to abandon the process, in an instant, with no attachment, if the process that emerges is not what you had planned.