FACILITATION CHALLENGES AND INTERVENTIONS

Video-Based Training for Facilitators
Facilitation Challenges and Interventions: Video-based Training for Facilitators

“Facilitation Challenges and Interventions: Video-based Training for Facilitators” was created as part of the League for Innovation in the Community College’s Faculty Voices Initiative. See www.league.org/facultyvoices.

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FACILITATION CHALLENGES AND INTERVENTIONS
Video-Based Training for Facilitators

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How to Use This Manual

Public Agenda and the League for Innovation in the Community College created the “Facilitation Challenges and Interventions: Video-Based Training for Facilitators” training manual as a guide to accompany the “Facilitation Challenges and Interventions” training video*. The video and manual serve as complementary training tools, designed to provide facilitators with opportunities to explore techniques that may be effective in challenging situations.

These resources are designed for training people to facilitate public deliberation. In this type of discussion, people talk about how a particular issue or problem affects them, they learn more about the issue, they consider a range of views about what should be done and (in some cases) they decide how they want to take action on the issue.

The “Facilitation Challenges and Interventions” video comprises four vignettes that highlight common concerns facilitators may have:

1. **Setting the Stage for Productive Conversations**: Facilitator provides an example of a welcome, introduction and ground rules setting.

2. **Managing Dominant Participants**: Facilitator manages a participant who dominates the conversation.

3. **Minimizing Distractions**: Facilitator encounters two participants who are distracting other participants.

4. **De-escalating Conflict**: Facilitator helps participants work through conflict.

The vignettes are not intended to serve as models of best practices in facilitation. Instead, they were created to illustrate techniques that can be used to facilitate dialogues. An optional role-play exercise has been included in the training to give participants the opportunity to test out facilitation techniques that are demonstrated in the videos.

The “Facilitation Challenges and Interventions” training manual comprises suggested lesson plans for trainers, as well as a number of resources for trainers and facilitators: Sample Training Agenda, Ground Rules Setting Guide, Typology of Conflicts, Dealing with Emotion, Facilitation Checklist, Room Setup Guide, Welcome and Introduction Checklist, Recording and Reporting Guide and Role-Play Cards for participants to use when they facilitate their own trainings.

*To request copies of this video, please contact PE@publicagenda.org.
LESSON PLAN
Overview: Facilitating Dialogues

| LEARNING OUTCOMES | • To understand the characteristics and responsibilities of an effective facilitator  
|                  | • To explore techniques that can be employed in challenging situations when facilitating dialogues  
|                  | • To practice facilitating a dialogue through a role-playing exercise |
| TIME             | 3–5 hours (Depending on group size and the activities that you choose) |
| # OF PARTICIPANTS| 5–25 |
| TRAINERS         | This training is best implemented with two trainers: one person to lead the training and the other person to record on the flip chart and/or set up the video |
| FORMAT           | Small group discussion, large group discussion, a role-play exercise and video screening |
| MATERIALS        | “Facilitation Challenges and Interventions” video and Role-Play Cards |
| EQUIPMENT        | Laptop, projector, screen, audio/microphone, flip chart easel, flip chart pad, markers and timer |
Welcome and Introduction

<table>
<thead>
<tr>
<th>LEARNING OUTCOMES</th>
<th>To understand the objectives and format for the workshop</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIME</td>
<td>45 minutes</td>
</tr>
<tr>
<td>FORMAT</td>
<td>Large group discussion</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>Timer</td>
</tr>
<tr>
<td>REFERENCES</td>
<td>Welcome and Introduction Checklist, Sample Facilitation Training Agenda and Ground Rules Setting Guide</td>
</tr>
</tbody>
</table>

1. Welcome, Introduction and Training Overview (15 minutes). Trainers briefly introduce themselves and describe the objectives and format for the day (Appendix I: Sample Facilitation Training Agenda).

   “First we just want to thank you for being here.”

   “The purpose of this workshop is to improve your ability to plan and facilitate productive dialogues.”

2. Participants Introduce Themselves—Large Group Discussion (20 minutes).

   “We will go around the room so you can introduce yourselves. Say your name and what brought you here today.”


   “Before we begin, does anyone have any questions?”

**KEY**

- Suggested script for training
- Flip chart text
- Documents
- Equipment
- Materials
- PowerPoint presentation
Facilitating Dialogues Overview

<table>
<thead>
<tr>
<th>LEARNING OUTCOMES</th>
<th>To understand the characteristics and responsibilities of an effective facilitator</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIME</td>
<td>30 minutes for small group and 1 hour for large group</td>
</tr>
<tr>
<td>FORMAT</td>
<td>Small group discussion, large group discussion and a role-play exercise</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>Flip chart easel, flip chart pad, markers and timer</td>
</tr>
<tr>
<td>REFERENCES</td>
<td>Reporting and Recording Guide</td>
</tr>
</tbody>
</table>

1. Characteristics and Responsibilities of an Effective Facilitator—Small Group Discussion (15 minutes).
   a. Break participants into groups of four to six people.
      “By a show of hands, how many of you regularly facilitate meetings?”
      “How many of you have participated in a facilitated group discussion?”
   b. Prepare on flip chart: (Flip chart)
      “What are the characteristics and responsibilities of an effective facilitator?”
   c. Discuss the characteristics and responsibilities in small groups.
2. Characteristics and Responsibilities of an Effective Facilitator—Large Group Discussion (15 minutes). (Flip chart)

a. Ask each group to report out and record participants’ responses on a flip chart and highlight the following responses if they are not mentioned:

- **Remains impartial about the subject.** Avoid expressing your own opinion or evaluating the comments of the participants (be careful with saying, “Good point!”). However, facilitators are not “neutral” or disengaged, and in fact they should be passionate about the process itself.

- **Helps the group set and abide by its own rules.** When participants set their own rules on how they will act toward one another (for example, “we won’t interrupt each other” or “turn off cellphones”), they are more likely to abide by them. The facilitator can help by asking people to propose rules and posting them where everyone can see them.

- **Allows the participants to own the process and topic as much as possible.** Facilitators facilitate (that is, help others achieve their goals more productively), they don’t control or dominate. Based on their other responsibilities, they must intervene as necessary but should also realize that doing too much may be worse than not doing enough.

- **Models cooperative attitudes and skills.** By exhibiting strong listening skills and asking good questions, you can model the behaviors you are hoping the participants will develop.

- **Keeps the discussion focused and on track.** When comments go astray, bring participants back to the goals of the session. Make sure the goals are clear, even if the conversation is wide-ranging.

- **Reminds people to focus on issues rather than personalities.** If the conversation begins to focus on personalities rather than issues, gently remind the group of its ground rules or refocus the dialogue on the issue. An effective facilitator creates an atmosphere of acceptance of all ideas and persons and helps give an equal hearing to all perspectives.

- **Asks clarifying questions when necessary.** If you are not sure what a participant means, chances are good that others are unclear also. You may ask participants to clarify what they are trying to say and ask if you have understood correctly.

- **Ensures that no one person dominates the discussion.** Facilitators should be aware of who has spoken and who has not, ensure that all voices get heard if possible and see that no voices dominate the discussion (such as strong advocates or experts).

- **Helps people prioritize their ideas for action.** Helping people move from exploratory dialogue to concrete action planning is an important role for a facilitator.
3. Challenges to Facilitating Conversations—Small Group Discussion (15 minutes).
   a. Prepare on a flip chart: (Flip chart)
      “What are the challenges you’ve experienced or observed in facilitating conversations?”
   b. Discuss challenges in small groups.

4. Challenges to Facilitating Conversations—Large Group Discussion (15 minutes).
   a. Ask each group to report out and record on flip chart and highlight the following responses if they are not mentioned:
      • One person dominates the conversation.
      • Some people don’t participate in the conversation.
      • Participants continue to speak directly with the facilitator rather than with other participants.
      • Experts or participants with more background information inhibit the conversation.
      • A participant rambles on (and on, and on...).
      • Participants express strong emotions.
      • There is conflict among the participants.
      • Participants take the conversation off track.
      “Does anyone have any questions?”

**KEY**

- Suggested script for training
- Flip chart text
- Documents
- Equipment
- Materials
- PowerPoint presentation
Facilitation Techniques Video Demonstration and Discussion

<table>
<thead>
<tr>
<th>LEARNING OUTCOMES</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• To explore techniques that can be employed upon encountering challenging situations when facilitating dialogues</td>
<td></td>
</tr>
<tr>
<td>• To understand the Six Basic Facilitator Choices</td>
<td></td>
</tr>
<tr>
<td>• To understand how to recognize effective deliberation</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TIME</th>
<th>40 minutes for viewing videos with a 10 minute discussion after each video. You will need more than an hour if you would like to schedule additional time for discussion.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>FORMAT</th>
<th>Small group discussion and large group discussion</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>MATERIALS</th>
<th>“Facilitation Challenges and Interventions” video &amp; PowerPoint presentation</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>EQUIPMENT</th>
<th>Laptop, projector, screen, audio/microphone, flip chart easel, flip chart paper, markers and timer</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>REFERENCES</th>
<th>Facilitation Checklist, Reporting and Recording Guide, Typology of Conflicts and Dealing with Emotion</th>
</tr>
</thead>
</table>
1. “Facilitation Challenges and Interventions” Video Demonstration (30 to 60 minutes).  
(\textit{Laptop, projector, screen and audio/microphone})

a. Introduce the session using examples gleaned from the previous conversation.

“\textit{You mentioned that it is challenging when . . .}”

– One person dominates the conversation.
– A participant rambles on.
– Participants express strong emotions.
– There is conflict among the participants.
– Participants take the conversation off track.

“We would like to show you some examples of these challenges that you may face when facilitating dialogues.”

“\textit{Please keep the following questions in mind as you watch the videos}.”

b. Display on a flip chart. (\textit{Flip chart})

1) Have you faced or observed situations like this in the past?
2) What did the facilitator do that worked well?
3) What would you have done differently?
4) Are there any techniques that you plan to incorporate when facilitating dialogues?

c. Tell the participants that they can jot down notes if they like.

d. Play the vignettes one at a time, breaking to discuss the questions in part e.

• \textbf{Setting the Stage for Productive Conversations}: Facilitator provides an example of a welcome, introduction and overview of ground rules setting (5:12 minutes).

• \textbf{Managing Dominant Participants}: Facilitator manages a participant who dominates the conversation and does not allow others to participate (3:54 minutes).

• \textbf{Minimizing Distractions}: Facilitator encounters two participants who are distracting other participants by engaging in a side conversation (3:59 minutes).

• \textbf{De-escalating Conflict}: Facilitator helps participants work through conflict (5:02 minutes).

\begin{center}
\textbf{KEY}
\end{center}

\begin{itemize}
  \item \textit{Suggested script for training}
  \item \textit{Flip chart text}
  \item \textit{Documents}
  \item \textit{Equipment}
  \item \textit{Materials}
  \item \textit{PowerPoint presentation}
\end{itemize}
e. After each vignette, ask the following questions:

“Have you faced or observed situations like this in the past?”

“What did the facilitator do that worked well?”

“What would you have done differently?”

“Are there any techniques that you plan to incorporate when facilitating dialogues?”

2. The Six Basic Facilitator Choices

This is information that can be displayed in a PowerPoint presentation and then reviewed verbally.

a. **Move on** to the next speaker, encouraging orderly conversation without speaking over one another. People like to talk, and in many cases you will have a line of people ready to talk and can simply move from one to another.

b. **Paraphrase** what a person has said in order to clarify the point, help the recorders and/or move the conversation to a deeper level. When paraphrasing, always do so in a way that makes it easy for the speaker to correct you. (“So what I’m hearing is that… Is that right?”)

c. **Ask a “probing” or “follow-up”** question to the same speaker to get clarification or dig deeper.

   Example: “Why is that important to you?”; “Can you say more about that?”

d. **Ask a “reaction”** question that seeks to have other people respond to the last speaker’s comments in some way.

   Example: “Does anyone else have a different view?”

e. **Ask a new starting question.** Depending on the goals of the session, you may have a set of questions you are supposed to ask, or you may have certain issues you want to discuss, so you may just jump in to take the conversation in a different direction. Based on the responses, you may also develop a question that works to combine or compare opinions that were shared. A new starting question may be particularly important if the conversation has gotten off track and the participants need to be redirected to the issue.

   Example: “Many argue that one of the key topics with this issue is X. What are your thoughts on its importance?”

f. **Let there be silence.** Often, facilitators feel pressure to keep the conversation flowing, so they are troubled by silence and seek to fill it with probing questions or a change of topic. However, sometimes the right thing to do is to sit with the silence and give people a little space to find their way to what they want to say.

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"Primary Facilitating Styles" and "The Six Basic Facilitator Choices" are adapted from "The Public Agenda Facilitator Handbook" (2012) and Martin Carcasson at the Center for Public Deliberation at Colorado State University.
3. Recognizing Deliberation

This is information that can be displayed in a PowerPoint presentation and then reviewed verbally.

A good facilitator recognizes when the following is occurring and nurtures it:

- Discussion considers several different points of view.
- People are talking about what is valuable to them.
- The group recognizes that the issue is complex.
- People are talking about consequences and weighing the trade-offs.
- People are struggling within themselves and with one another’s ideas.
- “I” becomes “we.”
- The discussion is civil but not simply polite. Disagreements are aired in the spirit of seeking increased understanding.

“Does anyone have any questions?”

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2 “Recognizing Deliberation” is adapted from “The Public Agenda Facilitator Handbook” (2012), Martin Carcasson at the Center for Public Deliberation at Colorado State University and original Kettering Foundation National Issues Forums material.
Facilitation Role-Play Exercise

<table>
<thead>
<tr>
<th>LEARNING OUTCOMES</th>
<th>To practice facilitating a dialogue through a role-playing exercise</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIME</td>
<td>60 to 90 minutes</td>
</tr>
<tr>
<td>FORMAT</td>
<td>Role-play exercise, small group discussion and large group discussion</td>
</tr>
<tr>
<td>MATERIALS</td>
<td>Role-Play Cards</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>Timer</td>
</tr>
</tbody>
</table>

1. Role-play exercise (60 to 90 minutes). (Appendix IX: Role-Play Cards)

- Divide participants into small groups of four. Ideally, each group is led by one facilitator.
- Hand out the Role-Play Cards and explain the rules.
  "Each participant has five minutes to play the role of Facilitator for a different part of the conversation."
  "When you are playing the role of Facilitator, you will not play the role on your card."
  "After each role-play round we will take five minutes to talk about what happened during the role-play from the perspective of the facilitator by discussing the following questions:"
  - What was that experience like for you?
  - What worked well?
  - What might you have done differently?
  "I will then ask the participants the following questions."
  - What did you experience?
  - What worked well?
  - What might you have done differently?

KEY
- Suggested script for training
- Flip chart text
- Documents
- Equipment
- Materials
- PowerPoint presentation
“After the coaching debrief we will rotate roles”

• Describe the scenario.

“Imagine that you are a resident of Bradford in a facilitated community meeting to discuss the proposed big-box chain store—ProMart. Everyone will have an opportunity to facilitate a session for five minutes. Participants should feel free to assume the role outlined in your Role-Play Card.”

“The conversation will proceed as follows:”

Facilitator 1: Welcome and introduction.

Facilitator 2: What have other communities learned from having a ProMart, and how does that impact your thinking around this issue?

Facilitator 3: Let’s explore some ways that ProMart could impact the local economy.

Facilitator 4: Common ground and areas of disagreement.

Facilitator 5: Next steps and closing.

• Either ask for a volunteer to begin facilitating or choose someone to start.

2. Large group exercise. Debrief.

“Does anyone have any questions?”

Tips for providing feedback

• Start with at least two positive comments followed by one comment on what they can improve.

• Provide concrete examples.

• Focus on the nonverbal as well as verbal communication.
Final Questions and Closing

<table>
<thead>
<tr>
<th>LEARNING OUTCOMES</th>
<th>To answer any remaining questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIME</td>
<td>25 minutes</td>
</tr>
<tr>
<td>FORMAT</td>
<td>Large group discussion</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>Timer</td>
</tr>
</tbody>
</table>

1. Large group discussion (15 minutes). Respond to participant questions.

“What remaining questions, comments or concerns do you have about facilitating dialogues?”

2. Lecture (10 minutes). Closing.

• Highlight the following items:

  “Great job! Facilitation is an art, not a science, and practice is the best way to continue developing your facilitation skills.”

  “Please feel free to contact us if any questions come up for you later.”
APPENDIX
## I: Sample Facilitation Training Agenda

<table>
<thead>
<tr>
<th>Session Topic</th>
<th># of Minutes</th>
<th>Start/Stop Time</th>
<th>Actual Start/Stop Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>WELCOME &amp; INTRODUCTIONS</td>
<td>45</td>
<td>1:00 pm/1:45 pm</td>
<td></td>
</tr>
<tr>
<td>FACILITATING DIALOGUES OVERVIEW</td>
<td>60</td>
<td>1:45 pm/2:45 pm</td>
<td></td>
</tr>
<tr>
<td>BREAK</td>
<td>15</td>
<td>2:45 pm/3:00 pm</td>
<td></td>
</tr>
<tr>
<td>FACILITATION ROLE-PLAY EXERCISE</td>
<td>90</td>
<td>3:00 pm/4:30 pm</td>
<td></td>
</tr>
<tr>
<td>FINAL QUESTIONS &amp; CLOSING</td>
<td>15</td>
<td>4:30 pm/4:45 pm</td>
<td></td>
</tr>
</tbody>
</table>

*We recommend that you schedule time for at least one fifteen-minute break and a lunch break if the meeting falls between noon and 1:00 pm.*
II: Ground Rules Setting Guide

Constructive dialogue and deliberation is more likely to take place if some guidelines are laid out at the beginning; they can help prevent difficulties later on. Aside from establishing the boundaries of productive dialogue, a key function of ground rules is to provide the participants with examples of norms and behaviors in which they will hopefully find value beyond the conversation itself. The hope is that once they realize the higher quality of conversation that occurs under these conditions, it becomes a habit for them that impacts their communication style in multiple settings.

The Basic Ground Rules

- Be honest and respectful
- Listen to understand
- It’s okay to disagree, but do so with curiosity, not hostility
- Be brief, so everyone has an opportunity to participate
- Put your phone on vibrate and resist the temptation to check e-mail or multitask

1 Adapted from The Public Agenda Facilitator Handbook (2012) and Martín Carcasson at the Center for Public Deliberation at Colorado State University
III: Typology of Conflicts

Facilitating dialogue and deliberation has many connections to the field of conflict management. Conflicts are inherent to collaborative problem solving, and people need to learn how to deal with the inherent conflict more productively, rather than seek to resolve or avoid conflict. The first step to managing conflicts is understanding them. In particular, understanding at what level a conflict may reside is critical for facilitators to understand how to address the conflict.

1. **Conflict based on different facts**
   These conflicts are perhaps the most difficult to address in dialogue and deliberation. If participants with opposing views have fundamentally different facts they are working with, and there is no clear way to resolve those differences with the resources available during the conversation, then at times the best the facilitator can do is bracket the discussion and have the participants simply agree to disagree and perhaps seek out the answer—if there is one—after the conversation.

2. **Conflict based on misunderstandings**
   At times, what appear to be differences in facts are actually misunderstandings. Here the process and the facilitator can help address the conflict by making sure the opposing sides have a clear opportunity to explain themselves and listen to each other.

3. **Conflict based on value differences**
   Many conflicts are fueled by value differences. The process of clarifying those value differences, and having participants struggle with their actual value differences rather than false, perceived differences is very important. While serious differences may still exist, they are typically much more manageable when understood. The key to addressing these conflicts, then, is to isolate the values and help participants work through the differences. If the conflict is particularly heated, it may be useful for the facilitator to lay out what he or she sees as the conflict, or perhaps even ask a third participant to do so (“Would anyone want to try to characterize the differences between these two perspectives?”).

4. **Conflict based on outside issues**
   Sometimes conflicts arise that are the result of personalities, past history or other factors irrelevant to the issue (such as political goals). These conflicts are also difficult to address during the forums, and often require deeper interventions. The primary response for facilitators in these cases is to try to bring the group back to the issue at hand, in part by directing attention away from the participants in conflict.

Facilitators should also remember that in most deliberative settings, they do not need to resolve the conflict. Once the conflict is clarified, and the opposing views are clearly captured in the notes, it may simply be time to move on. Do not let a personal conflict dominate a discussion.

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1 Adapted from The Public Agenda Facilitator Handbook (2012) and Martin Carcasson at the Center for Public Deliberation at Colorado State University
IV: Dealing with Emotion

The first point to make here is that emotions are not detrimental to deliberation. One function of deliberation is to allow participants to express their emotions in a productive manner. Another is for participants from opposing perspectives to see the emotions present in others in a respectful, safe environment, so those emotions can contribute to increased understanding.

Facilitators can react to emotion in many different ways. Most often, you simply allow the participant a chance to vent (as long, of course, as no one feels threatened). The expression of emotion is often a clear opportunity to help participants move from positions to interests and reveal powerful underlying values and concerns. Paraphrasing may be particularly useful, especially for the other participants, who may get caught up in the emotion and miss the message being sent. Restating an argument made by an emotional participant in a less emotionally laden manner—taking out, for example, particularly inflammatory statements that may distract others—can be valuable technique.

Other suggestions for dealing with emotional participants from IAP2 include:

- Don’t interrupt, be defensive or argue.
- Respect the speaker’s opinion and his or her right to it.
- Try not to take anger or emotion personally.
- Use active listening skills.
- Ask questions to clarify the source of the speaker’s anxiety, concern, fear or anger.
- Summarize what you have heard so the speaker is sure he or she is being understood (often anger comes from repeated failed attempts to get an opinion across).
- Get the speaker’s agreement on the summary, and be sure to have his or her concerns clear in the notes.
- Ask the speaker what he or she would like done to address these concerns (shift from past to future).
- Check to make sure that you have accurately recorded the speaker’s comments and concerns.

3 Adapted from work done by the International Association for Public Participation, IAP2, http://www.iap2.org/
V: Facilitation Checklist

Room Set Up
- Round tables
- Chairs
- Flip chart easel
- Flip chart pad
- Markers
- Microsoft PowerPoint
- Laptop
- Projector
- Screen
- Audio/Microphone
- Timer or Clock (cell phone will suffice)
- “Facilitation Challenges and Interventions” Video
- Role-play Cards
- Handout Packets
- Mini notebooks
- Pens
- Refreshments

VI: Room Setup Guide
VII: Welcome and Introduction Checklist

Introductions and Thanks
- Introduce facilitator and organization.
- Thank participants.
- Participants introduce themselves.

Goals and Process
- Introduce the topic.
- Describe the format of the session.
- Introduce the goal for the conversation.
- Express interest in hearing from each participant.
- There are no right or wrong answers.
- Feel free to respond to one another. Feel free to have conversations with one another.
- We are not seeking consensus, a final vote or final decisions.

Facilitator Role
- Facilitator does not present his or her own views on the issue.
- Facilitator will help the group have a good discussion.
- Facilitator will help the group set ground rules.

Housekeeping
- Remind participants of the session duration.
- Point out the direction of the restrooms.
- Describe the process for getting food/refreshments.
VIII: Recording and Reporting Guide

The Basics of Recording and Reporting Principles and Practices

A. Purpose of Recording

• To help establish that what the participants say is valued and being listened to
• To remind participants of their comments, agreements and action items, particularly during the reflection time
• To support the importance of equality and inclusion. Comments are captured regardless of the source, and the author is not identified
• To serve as a reference document for future conversations
• To facilitate the writing of the report that will inform a wider audience of the discussion, decisions and actions

Qualities of Effective Recording

• Brief
• Clear
• Legible
• Accurate
• Well organized
• Uses active verbs
• Reports the appropriate amount of information
• Captures the tensions, tradeoffs and common ground for action
• Notes are distributed soon after the forum not to determine the value of a comment, but rather to capture the discussion

Adapted from Kaner’s Facilitator’s Guide to Participatory Decision-Making and The Public Agenda Facilitator Handbook (2012) and Martin Carcasson at the Center for Public Deliberation at Colorado State University
Treat each person’s contribution with equal respect

• Print in capital letters 2” to 4” tall
• Write straight up and down
• Close your letters (don’t leave gaps in B’s and P’s, for example)
• Use plain, block letters
• Practice makes perfect
• Alternate colors between speakers, but don’t use too many colors on one page
• Don’t crowd the bottom of the page

Additional suggestions

• Use the speakers’ words as much as possible.
• If you plan on using “dot voting” at the end of the forum, be sure to leave some space for the dots. You may also want to draw lines between the separate comments.
• Be sure to label the sheets before you take them down.
• Have a pen or pencil handy to write additional clarification comments, if necessary. Have recorders add comments to the sheets before they are taken down.

B. Purpose of Reporting

Reports summarizing conversations have many possible functions:

• They can serve as a tangible document concerning the state of the issue that can then be utilized to clarify necessary next steps in the conversation. In particular, they can help identify tough choices, common ground, key fact questions to explore more fully, and a broad sense of the potential stakeholders on the issue.
• They can extend the conversation beyond the participants in the actual event and pass on the important work done during those conversations.
• They can serve to bridge gaps between different stakeholders, each person can respond to the work done by the others as represented in the report and use that as a point of departure.
• They can provide deeper analysis of the interactions than were possible during the event by allowing the opportunity to examine the notes and/or audio or video (if applicable), particularly if multiple groups went through the process and cross-group comparisons can be made.
• They can serve as a catalyst to action and a reminder of the promises or suggestions made during forums.
• They can develop a record of collaborative work that can be used to increase understanding on the issue across the group.
VIII: Role-Play Cards

<table>
<thead>
<tr>
<th>Character A</th>
<th>PASSIONATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Well-respected Bradford resident who is concerned about the community. You would like to see ProMart build a store in town, and you look forward to the opportunities that store will bring to the town.</td>
<td></td>
</tr>
<tr>
<td>• You are outspoken and are not afraid to share your opinions.</td>
<td></td>
</tr>
<tr>
<td>• You call out people with whom you disagree and you monopolize the conversation.</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Character B</th>
<th>EXPERT</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Lifelong Bradford resident who is opposed to ProMart.</td>
<td></td>
</tr>
<tr>
<td>• You have many concerns about ProMart itself; besides, you don’t want to see the character of your community change.</td>
<td></td>
</tr>
<tr>
<td>• You are an expert on the topic of chain stores taking over small towns.</td>
<td></td>
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<thead>
<tr>
<th>Character C</th>
<th>RESERVED</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Third-generation Bradfordian who runs your family’s hardware store in Bradford.</td>
<td></td>
</tr>
<tr>
<td>• You care about your employees and your customers and are opposed to ProMart.</td>
<td></td>
</tr>
<tr>
<td>• You tend to be shy and do not share unless asked directly. When you do share your opinions, you sometimes take the conversation off track.</td>
<td></td>
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</tbody>
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<table>
<thead>
<tr>
<th>Character D</th>
<th>INTERRUPTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Bradford resident who is an unemployed single parent taking courses at Bradford Community College.</td>
<td></td>
</tr>
<tr>
<td>• You look forward to the employment opportunities that ProMart will provide the community.</td>
<td></td>
</tr>
<tr>
<td>• You cut people off who you feel do not agree with you.</td>
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<table>
<thead>
<tr>
<th>Character E</th>
<th>INTELLECTUALIZER</th>
</tr>
</thead>
<tbody>
<tr>
<td>• You have lived in Bradford for only about six months.</td>
<td></td>
</tr>
<tr>
<td>• You are deeply concerned with the environmental ramifications of a large store like ProMart, especially the increased traffic, effluent runoff from the parking lots, air and noise pollution from the delivery trucks and increased garbage.</td>
<td></td>
</tr>
<tr>
<td>• You tend to intellectualize rather than give actual responses.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Character F</th>
<th>PESSIMIST</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Born and raised in Bradford. You left for several years, and now that you are back you are invested in the community.</td>
<td></td>
</tr>
<tr>
<td>• You are not sure what you think of ProMart.</td>
<td></td>
</tr>
<tr>
<td>• You are often pessimistic and see the downside to everything.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Character G</th>
<th>SPEAKS TO FACILITATOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>• You just moved to Bradford.</td>
<td></td>
</tr>
<tr>
<td>• You are concerned about the low wages that a ProMart would pay its employees, as well as the potential to displace local businesses.</td>
<td></td>
</tr>
<tr>
<td>• You are outspoken by nature and speak directly with the facilitator rather than with other participants because you feel it will better get your point across.</td>
<td></td>
</tr>
</tbody>
</table>
About Public Agenda

Public Agenda helps build a democracy that works for everyone. By elevating a diversity of voices, forging common ground, and improving dialogue and collaboration among leaders and communities, Public Agenda fuels progress on critical issues, including education, health care and community engagement. Founded in 1975, Public Agenda is a nonpartisan, nonprofit organization based in New York City.

Find Public Agenda online at PublicAgenda.org, on Facebook at facebook.com/PublicAgenda and on Twitter at @PublicAgenda.

About The League for Innovation in the Community College

The League for Innovation in the Community College (League) is an international nonprofit organization with a mission to cultivate innovation in the community college environment. The League hosts conferences and institutes, develops print and digital resources, and leads projects and initiatives with almost 500 member colleges, 100 corporate partners and sponsors, and a host of other government and nonprofit agencies in a continuing effort to advance the community college field and make a positive difference for students and communities.

Information about the League and its activities is available at www.league.org.