



Facilitated Discussions:

A Volunteer Management Workbook

Volunteer Canada gratefully acknowledges the author, Liz Weaver, for her work on *Facilitated Discussions: A Volunteer Management Workbook*.

This resource was produced through the Canada Volunteerism Initiative, financed by the Government of Canada.



VOLUNTEER
BÉNÉVOLES
C A N A D A

Funded by the Government of Canada
through the Canada Volunteerism Initiative

Canada

Table of Contents

Background	3
Volunteer Canada	4
Planning for the Facilitated Discussions	5
Step One: Establishing the Plan for Hosting a Facilitated Discussion ...	5
Step Two: Development of an Invitation List	6
Step Three: Letter of Invitation to Identified Participants	7
Step Four: Follow-up Telephone Calls with Identified Participants	8
Step Five: Confirmation Letter	8
Step Six: Hosting the Facilitated Discussion	9
Step Seven: Thank You Letter to Participants	9
Administrative and Room Requirements for the Facilitated Discussion ..	11
Draft Facilitated Discussion Agenda	13
Generic Template for Hosting a Facilitated Discussion	13
Sample Template: Facilitated Discussions	
Volunteer Management Practices	16
Facilitated Discussions Design Hints	19
Understanding Facilitation	21
Core Facilitation Practices	22
Record Keeping and Reporting	25
Integrating the Results of the Facilitated Discussion	27
Communications and Integration Strategy	
for Facilitated Discussion Results	28
Final Thoughts	29
Facilitated Discussion Report Form	31
Host Organization Profile	31
Facilitated Discussion: Volunteer Management Practices	
Priority Ranking Sheet	32
Sample Participant Profile and Feedback Form	34



Background

Voluntary organizations often identify the need to consult stakeholders in the development, design, delivery or review of service and programs. The consultation process may happen prior to the initiation of a new service or as a check in or review of an existing service or program. This workbook has been developed as a tool to assist organizations in collecting stakeholder information and comments in a practical way ensuring a high degree of participant involvement. By following the steps in this workbook, voluntary organization staff and/or volunteers will be able to systematically capture stakeholder comments, data and develop strategies for integrating this information into program design and delivery.

The **Facilitated Discussion** workbook has been developed by Volunteer Canada as part of the Canada Volunteerism Initiative – Community Support Centre program. The objectives of the Canada Volunteerism Initiative are as follows.

Encourage Canadians to participate in voluntary organizations

The development of more effective approaches around organizational management in volunteer development will result in volunteer programs that are more attractive to potential volunteers.

Improve the capacity of organizations to benefit from the contributions of volunteers

Directed projects which determine real strategies to improve volunteer development strategies will better position organizations to involve volunteers more effectively. Mechanisms to create knowledge and share information will ensure the broadest cross-section of organizations can benefit.

Enhance the experience of volunteering

Community support projects will serve to increase the understanding of the most effective organizational management approaches to volunteer involvement thereby ensuring that volunteers can have the best experience possible.

The CVI—Community Support Centre has been designed to reach out across the broad voluntary sector and identify tools, resources, and innovative practices which can be shared in a knowledge transfer strategy.

In the first phase of the CVI – Community Support Centre from December 2002 – March 2003, over 150 voluntary organizations across Canada hosted *community-based facilitated discussions* in an attempt to gather information about volunteer management practices including recruitment, oversight, recognition and innovative practices. It was essential in the design that all sessions collect data on the same topics and that the facilitated discussion process in each community be managed in a consistent format, collecting consistent data.

This resource workbook is built on that framework and includes a section which identifies how the organization can integrate the data collected through the facilitated discussion model. During the roll-out of these facilitated discussion sessions on volunteer management practices across Canada, it was recognized that the framework could be made into a useful tool for organizations which might want to involve stakeholders in a focused discussion format.

Volunteer Canada

Volunteer Canada is the national centre for volunteering in Canada. The mandate of Volunteer Canada is to promote and facilitate volunteerism and to strengthen community by enhancing the ability of the voluntary sector and other organizations to engage volunteers.

Since its inception, Volunteer Canada has been developing tools and resources which are designed to enhance the capacity of voluntary sector organizations. During the 2001 International Year of Volunteers, a number of resources focusing on volunteer involvement strategies were developed. For information and access to these resources, visit www.volunteer.ca. For additional information about Volunteer Canada, visit the website at www.volunteer.ca/volunteercanada.

Planning for the Facilitated Discussions

Below is a process for host organizations to follow when planning for and hosting a facilitated discussion session. Recognizing that there may be approaches which work better in your community, this workbook design provides a template for the host organization to utilize and ensures that there is a standard outreach to potential participants in the facilitated discussion sessions.

Step One: Establishing the Plan for Hosting a Facilitated Discussion

Each facilitated discussion group should have 10 – 12 participants who have involvement with volunteers in your community. In communities with larger populations, you may consider hosting more than one facilitated discussion. However, in smaller communities you may have a mix of participants such as paid full-time staff, part-time paid staff, and unpaid volunteers. In larger communities, you might separate these into different discussion groups.

The goal of the facilitated discussion should be to involve a range of individuals or stakeholders in the experience so that the organization will benefit from a variety of perspectives. Below is a list of some individuals and/or discussion groups you might consider inviting to a facilitated discussion session:

- Paid, full-time manager/coordinators/staff of organizations
- Paid, part-time manager/coordinators/staff of organizations
- Volunteer members of Board of Directors of organizations
- Service delivery volunteers
- Diverse culture volunteer groups
- Sports group volunteers
- Service club members
- Faith community volunteers

In order to recruit 10 – 12 participants, you may have to identify 20 – 24 potential participants for each facilitated discussion. Some of the individuals identified will not be able to participate due to other community commitments and some may drop out between the invitation time and the facilitated discussion date. A list of 15 confirmed participants is reasonable and would allow for attrition.

Step Two: Development of an Invitation List

The facilitated discussion process is a relatively easy activity to plan, design and deliver within a community. To successfully achieve the information outcomes, you should build in approximately two months from initial design to the concluding priority setting exercise which is based on the information generated from the discussion session. Below is a table which should assist in identifying the participants for the facilitated discussion session.

In some situations, the organization may wish to bring stakeholders together who represent a single perspective, sector or view. In other situations, the organization might be looking for a diversity of perspectives in order to generate as much dialogue and information as possible. The facilitated discussion design can accommodate both approaches to stakeholder involvement.

Facilitated Discussion Date	Location	Prospective List of Invited Participants	Participant's Organization	Report Review Date

Step Three: Letter of Invitation to Identified Participants

Below is a draft letter of invitation, which can be sent to identified participants in the facilitated discussion session hosted by your organization. While this letter can be used by most host organizations, there may be cases where travel support will have to be provided to participants traveling a longer distance to attend the session. Many host organizations might also want to include a map to the facilitated discussion meeting location if the session is being held off-site from their immediate office location.

Draft Letter of Invitation for Participants:

Date:

Address:

Dear Participant:

Name of Organization is interested in your views and opinions. We are inviting you or a designate from your organization to participate in a facilitated discussion session where we will be gathering the views and advice of our members in the design and development of (name of project, program, etc.). (You might include more details about the program or project here).

The facilitated discussion session on (name of the project or program) will be held on (date and time) at (location). A map to the (location) is attached. The information generated from this discussion will be used by (name of the organization) for analysis and will provide the context for developing resources in the next phase of the program. The information will also be extremely helpful to (your organization name) as we develop plans to support organizations in our community.

The facilitated discussion will take approximately three hours. You will meet other individuals in our community. Please RSVP by (put a date here) by calling (number) or emailing (contact). We look forward to having you join us and contributing to this very important initiative.

If you have any questions or concerns, please do not hesitate to contact me.

Sincerely,

Your name and Your Organization

Step Four: Follow-up Telephone Calls with Identified Participants

Below is a template for a follow-up telephone call. These calls should be made a week to three days in advance of the facilitated discussion session. Telephone calls will confirm participation and reinforce the importance of their involvement in the event.

Draft Follow-up Telephone Call:

Hi (name of participant),

I'm (your name) and I am calling on behalf of (your organization's name). I'm calling to confirm your participation in the facilitated discussion about (name of the project or program) which we are hosting on (details about the event). We're really pleased that you have agreed to join us. There will be (number of others) attending the discussion and we know that the discussion will be interesting and informative. As you know, (your organization's name) is hosting this discussion to generate information for name of the project or program.

Do you have any questions or concerns about the meeting? Is there any other information or support that we can provide?

Thanks for your time. We look forward to meeting you on (reinforce the information about the meeting time and location). Please feel free to call me if you have any other questions.

Step Five: Confirmation Letter (if required, but may not always be necessary)

Date

Name and Address

Dear

Thank you so much for agreeing to participate in a facilitated discussion about (name of the project or program) which will be hosted by (your organization) on (date, time and location). We value your involvement. The information generated from this discussion will be shared with (appropriate staff members or board members within the organization)

Please do not hesitate to contact me should you have any questions or concerns. I look forward to meeting you on (date of the discussion).

Sincerely

Your Name and Your Organization

Step Six: Hosting the Facilitated Discussion

Below are instructions which will assist your organization in hosting the facilitated discussions. If the organization is hosting multiple facilitated discussion sessions, it is important that the information generated from each of the discussions is collected through consistent questions and a consistent format. This will assist the organization in identifying key themes arising from the discussions and determining which program changes, outcomes, and deliverables need to be followed.

Step Seven: Thank You Letter to Participants

Draft Thank You Letter for Participants attending the Facilitated Discussion

Date

Name and Address

Dear Name,

*On behalf of (your organization name), I would like to thank you for participating in the **Facilitated Discussion** on (name of project or program) on (date of the discussion). The information generated through this discussion will be utilized by (name of your organization) to assess, modify and improve our program. We certainly appreciate your time and your participation.*

If you have any further comments or questions, please do not hesitate to contact me at (your telephone number).

Sincerely,

Your name and Your organization



Administrative and Room Requirements for the Facilitated Discussion

Below is a list of the administrative and room requirements, which should be considered by the organization hosting a facilitated discussion session. In some organizations, there might be a room suitable to host a meeting of 12 to 15 participants while other organizations and groups may have to rent a space or have a meeting room donated. Since the facilitated discussion session takes approximately three hours to complete, it is suggested that the host organization provide some sort of refreshments for the participants. Generally, these refreshments need only include beverages and either cookies, muffins or donuts. In some cases, travel expenses incurred by participants may have to be reimbursed for participants who are traveling significant distances to participate in the session. If this is the case, travel expenses should be built into the original budget plan for the facilitated discussion session.

- Meeting Room large enough to host 15 people comfortably and available for a 3.5 hour period to allow for set up and clean up
- Table and chairs for each of the participants attending
- Refreshments for participants including coffee, tea, juice, water, cookies
- Flipchart with enough paper to capture notes and flipchart markers
- Nametags, and enough pens/pencils for participants
- Facilitator for the Session
- Flipchart recorder
- Facilitated Discussion Workbook for Facilitator
- Participant hand outs which might include a copy of the questions being asked through the facilitated discussion session or a profile of the program or service being discussed
- Participant profile forms for each of the participants which will allow the organization to keep records on attendance and provide an opportunity for evaluation



Draft Facilitated Discussion Agenda

Each facilitated discussion should take approximately three hours to complete. As the facilitator, you should try and make all participants feel comfortable and encourage their participation in all elements of the discussion. Below is a template for the agenda which Volunteer Canada hosts used as a model for capturing information about volunteer management practices. It is important that each facilitated discussion session present the same questions/statements. Consistency in approach will allow for the integration of data from multiple sessions. Near the end of each facilitated discussion participants will be involved in a priority setting activity or be asked to identify the common themes which recurred during the discussions of each of the questions or topic areas. The priority setting or themeing process will assist the host organization in verifying the information collected and gaining consensus from the group about the most important or common themes.

Generic Template for Hosting a Facilitated Discussion:

Time	Activity	Facilitator Notes
10 min.	Welcome Guests - Present overview of Host Organization -Present overview of issue, program, service being discussed - Present process for facilitated discussion	Introduce Yourself Introduce the Host Organization Introduce the Issue, Program, Service to be discussed Introduce Facilitated Discussion Process The facilitated discussion is an opportunity for the organization to collect consistent data about three to four key issues related to a specific program or service being offered. Definition of Key Issues Provide for the participants the key issues which will be discussed. These key issues should be written on a posted flip chart sheet for everyone to read and might also be provided on a hand out sheet as well.
10 min.	Participant Introductions	Participants introduce themselves, their position and their organization. The facilitator invites everyone to participate in this part.

Time	Activity	Facilitator Notes
20 min.	<p>Question # 1 Introduce the first question to be considered. The question should be open which means that participants will be asked to provide advice as opposed to a yes or no answer.</p>	<p>The facilitator introduces the first question and then asks the participants to respond and build on others responses. There will be a priority rating or themeing process at the end of the discussion of the four questions.</p>
20 min.	<p>Question #2 Introduce the second question to be considered. The question should be open which means that participants will be asked to provide advice as opposed to a yes or no answer.</p>	<p>The facilitator introduces the second question and then asks the participants to respond and build on other responses.</p>
20 min.	Break	<p>There should be a 10 minute break for participants to get up and stretch or to get another refreshment.</p>
20 min.	<p>Question # 3 Introduce the third question to be considered. The question should be open which means that participants will be asked to provide advice as opposed to a yes or no answer.</p>	<p>The facilitator introduces the third question and then asks the participants to respond and build on other responses.</p>

Time	Activity	Facilitator Notes
20 min.	Question #4 Introduce the first question to be considered. The question should be open which means that participants will be asked to provide advice as opposed to a yes or no answer.	The facilitator introduces the final question and then asks the participants to respond and build on other responses.
15 min.	Check in with Group	Did we capture all of your thoughts? Did we miss anything?
30 min.	Priority Setting or Theme Capturing Exercise	The facilitator asks the group to spend 10 minutes per question area and either rank the answers from 1 (the most useful) to 5 (the least useful) or to observe themes which have resulted from the discussions by participants. There are two questions in this section: What was the most useful/effective strategy or technique described by participants (top 5 ranking) or what are the most common themes identified during the discussion? What were some other issues or concerns raised during these discussions which might require further work, resources or information?
15 min.	Distribution of Participant Profile Forms	Included in this workbook is a participant profile form. The facilitator will ask each participant to complete the form. These forms will provide consistent information about the participants and allow for an additional thoughts or concerns which the participant did not feel comfortable in raising during the group discussion.
10 min.	Wrap Up and Thanks to Participant Discussion of Next Steps	The facilitator thanks the participants on behalf of the organization. The facilitator lets the group know that the next steps are for the information generated from the facilitated discussion. The facilitator could also ask participants what they thought of the discussion, what were their impressions, what other suggestions they might provide to the organization.

Sample Template: Facilitated Discussions: Volunteer Management Practices:

Time	Activity	Facilitator Notes
10 min.	<p>Welcome Guests</p> <ul style="list-style-type: none"> - Present overview of CVI - Present process for facilitated discussion 	<p>Introduce Yourself</p> <p>CVI - The objectives of the CVI are to:</p> <ul style="list-style-type: none"> • encourage Canadians to participate in voluntary organizations: • improve the capacity of organizations to benefit from the contributions of volunteers; and • enhance the experience of volunteering. <p>The expected results are:</p> <ul style="list-style-type: none"> • increased awareness of the value of volunteers and voluntary organizations to Canadian society; • improved capacity of voluntary organizations to deliver programs and services for the benefit of Canadians; and increased participation in Canadian society through volunteering. <p>Facilitated Discussion</p> <p>The facilitated discussion is an opportunity for the Canada Volunteerism Initiative to collect consistent data around four key volunteer program management practice areas: recruitment, oversight, recognition and innovative practices.</p> <p>Recruitment is defined as the volunteer resources management practices which precede the assignment of a volunteer to a position within the organization and include volunteer position design, recruitment strategies, and screening.</p>

Time	Activity	Facilitator Notes
		<p>Oversight is defined as the volunteer management practices which occur once a volunteer is in a position. These practices include volunteer management policies, the involvement of a manager of volunteers and other supervisory staff, volunteer orientation and training, ongoing volunteer support, and volunteer supervision.</p> <p>Recognition is defined as the volunteer management practices which provide the volunteer with appropriate recognition of service including volunteer evaluation, volunteer service recognition practices, volunteer retention strategies and volunteer recognition policies.</p> <p>Innovative practices are defined as strategies which have been developed by the organization and have resulted in the enhanced delivery of the volunteer program. Innovative practices may occur at all levels of volunteer engagement and management and may have been developed by the manager of volunteers, other staff in the organization and/or volunteers in the organization.</p>
10 min.	Participant Introductions	Participants introduce themselves, their position and their organization. The facilitator invites everyone to participate in this part.
20 min.	<p>Question # 1 How does your organization determine the best way to involve volunteers in meeting the mission of the organization?</p>	The facilitator introduces the first question and then asks the participants to respond and build on others responses. There will be a rating process at the end of the discussion of the four questions.

Time	Activity	Facilitator Notes
20 min.	Question # 2 How does your organization assess the performance and effectiveness of individual volunteers?	The facilitator introduces the second question and then asks the participants to respond and build on other responses.
10 min.	Break	There should be a 10 minute break for participants to get up and stretch, or to get another refreshment.
20 min.	Question # 3 How does your organization recognize and value the contributions made by volunteers in achieving the mission of the organization?	The facilitator introduces the third question and then asks the participants to respond and build on other responses.
20 min.	Question #4 Can you describe an innovative volunteer management practice which has achieved results in your organization or group?	The facilitator introduces the final question and then asks the participants to respond and build on other responses.
15 min.	Check in with Group	Did we capture all of your thoughts? Did we miss anything?

Time	Activity	Facilitator Notes
30 min.	Priority Setting Exercise	The facilitator asks the group to spend 10 minutes per question area and rank the answers from 1 (the most useful) to 5 (the least useful). There are two questions in this section: What was the most useful/effective strategy or technique described by participants (top 5 ranking)? What were some other issues or concerns raised during these discussions which might require further work, resources or information?
15 min.	Distribution of Participant Profile Forms	Included in this workbook is a participant profile form. The facilitator will ask each participant to complete the form.
10 min.	Wrap Up and Thanks to Participant Discussion of Next Steps	The facilitator thanks the participants on behalf of the organization.

Facilitated Discussions Design Hints:

Framing Your Focus Questions:

Integral to the design of the facilitated discussion are the questions or statements you will ask the participants to address. The questions should be written in a way to ensure that more than a yes or no response is required. Closed questions only require a yes or no answer while open questions invite comments, suggestions and the sharing of ideas. In designing your facilitated discussion, you might want to develop your four question areas and then test the questions with a few individuals either in your office or in your volunteer program.

Some things to consider when drafting your questions: Are the questions clear and understandable? What additional information will be required by the participants to understand the questions or the intent of the questions? Are the questions written so they are free of jargon? What information are you hoping to obtain by asking the questions? Do you think you will get this information by the way the questions are currently written?



Understanding Facilitation

Facilitation and the facilitated discussion process is a mechanism for collecting information. The facilitator plays an important role in the group by managing the meeting but not participating in the discussion or trying to influence the outcome. Instead, the facilitator stays out of the discussion in order to focus on how the meeting is being run. The facilitator provides the participants with structure and tools and tries to ensure that all participants are heard during the course of the discussion.

Below are facilitation and facilitator guidelines for you to follow. These guidelines come from the book *Facilitating with Ease! A Step by Step Guidebook with Customizable Worksheets on CD-ROM*. By Ingrid Bens. Jossey-Bass Publishers. California. 2000.

Facilitators make their contributions by:

- helping the group define its overall goal, as well as specific objectives
- helping members assess their needs and create plans to meet them
- providing processes that help members use their time efficiently to make high-quality decisions
- guiding group discussions to keep it on track
- making accurate notes that reflect the ideas of members
- helping the group understand its own processes in order to work more effectively
- making sure that assumptions are surfaced and tested
- supporting members in assessing their current skills, as well as building new skills
- using consensus to help a group make decisions that take all members' opinions into account
- supporting members in managing their own interpersonal dynamics
- providing feedback to the group, so that they can assess their progress and make adjustments
- managing conflict using a collaborative approach
- helping the group communicate effectively
- helping the group access resources from inside and outside the group
- creating an environment in which members enjoy a positive, growing experience, while they work to attain group goals
- fostering leadership in others by sharing the responsibility for leading the group
- teaching and empowering others to facilitate

Core Facilitation Practices:

Staying neutral on content – your job is to focus on the process roles and avoid the temptation of offering opinions about the topic under discussion. You should use questions and suggestions to offer ideas that spring to mind but never to impose opinions on the group.

Listen actively – look people in the eye, use attentive body language and paraphrase what they are saying. Always make eye contact with people while they speak, when paraphrasing what they have just said, and when summarizing their key ideas. Also use eye contact to let people know they can speak next, and to prompt the quiet ones in the crowd to participate.

Ask questions – this is the most important tool you possess. Questions test assumptions, invite participation, gather information, and probe for hidden points. Effective questioning allows you to delve past the symptoms to get at root causes.

Paraphrase to clarify – this involves repeating what people say to make sure they know they are being heard, to let others hear their points a second time, and to clarify key ideas. (i.e. Are you saying...? Am I understanding that you mean...?)

Synthesize ideas – don't just record individual ideas of participants. Instead, get people to comment and build on each other's thoughts to ensure that the ideas recorded on the flip chart reflects collective thinking. This builds consensus and commitment. (i.e. Alice, what would you add to Jeff's comments?)

Stay on track – set time guidelines for each discussion. Appoint a time keeper inside the group or use a timer and call out milestones. Point out the digression if the discussion has veered off topic. 'Park' all off-topic comments and suggestions on a separate 'parking lot' sheet posted on a nearby wall, to be dealt with later.

Give and receive feedback – periodically 'hold a mirror' to help the group 'see' itself so that it can make corrections. (i.e. – Only two people are engaged in this discussion, while three others are reading. What's this telling us we need to do?) Also ask for and accept feedback about the facilitation. (i.e. – Are we making progress? How's the pace? What can I do to be more effective?)

Test assumptions – you need to bring the assumptions people are operating under out into the open and clarify them, so that they are clearly understood by everyone. These assumptions may even need to be challenged before the group can explore new ground. (i.e. – John, on what basis are you making the comment that Bob's idea is too narrow in focus?)

Collect ideas – keep track of both emerging ideas and final decisions. Make clear and accurate summaries on a flip chart or electronic board so everyone can see the notes. Notes should be brief and concise. They must always reflect what the participants actually said, rather than your interpretation of what they said.

Summarize clearly – a great facilitator listens attentively to everything that is said, and then offers concise and timely summaries. Summarize when you want to revive a discussion that has ground to a halt, or to end a discussion when things seem to be wrapping up.

Label sidetracks – it's your responsibility to let the group members know when they're off track. They can then decide to pursue the sidetrack, or stop their current discussion and get back to the agenda. (i.e. – We are now discussing something that isn't on our agenda, what does the group want to do?)

Park it – at every meeting tape a flip chart sheet to a wall to record all side track items. Later, these items can be reviewed for inclusion in a future agenda. 'Parking Lot' sheets let you capture ideas that may be important later, while staying on track.

Use the spell-check button – most people are nervous enough about writing on flip charts without having to worry that they're spelling every word right. You'll relax everyone by drawing a spell check button at the top right corner of every flip chart sheet. Tell participants they can spell creatively since pressing the spell check button automatically eliminates all errors.



Record Keeping and Reporting

The final element of the facilitated discussion session is record keeping and reporting. Since the organization has invested the time and energy in planning the design, inviting participants and hosting the facilitated discussion session, you will want to keep accurate records for each of the discussions hosted and ensure that reports are developed in a timely manner.

Attached are templates for record keeping and reporting forms. These templates can be used or revised by the host organization but they will enable the collection of consistent data which can be analyzed by the organization.

During the facilitation, either the facilitator or a record keeper will be tracking participant comments by capturing the information on flip chart sheets. Once the Facilitated Discussion is completed, the flip chart notes should be typed and attached to the final report forms. Below are some helpful hints for managing the flip chart which have been taken from *Facilitating with Ease!*

Do	Don't
Write down exactly what participants say. While their comments have to be edited somewhat, always use their key words. Check to make sure that what is written captures the meaning expressed.	Write down your personal interpretation of things. These are their notes. If unsure, ask 'What should I write down?'.
Use verbs and make phrases fairly complete. For example, 'work group' is not helpful as 'work group to meet Monday at 10 a.m.'. Always be sure the flip chart can convey meaning, even to someone who was not at the meeting.	Worry about spelling. If you make a fuss about it, it will inhibit participants.
Talk and write at the same time. This is necessary in order to maintain a good pace. Practiced facilitators can write one thing and be asking the next question.	Hide behind the flip chart or talk to it. Unless you are writing, stand squarely beside it, facing the members when reading back notes.
Move around and act alive. There is nothing worse than a facilitator who acts as though he or she is chained to the flip chart. If an important point is being made, walk closer to the person who is talking so you can better pay attention.	Stand passively at the flip chart while a long discussion is going on without writing anything down. Ideas don't need to be in complete sentences before recording them. Make note of key words and ideas. Comprehensive statements can be formulated later.
Write in black, blue or some other dark colour. Use fairly large letters so it can be read from the back of the room.	Use script unless you have great handwriting. Avoid red and other pale colours that are impossible to see from any distance.
Post flip chart sheets around the room so that participants can keep track of what has been discussed.	Monopolize the flip chart.



Integrating the Results of the Facilitated Discussion

During the course of the facilitated discussion, the facilitator or note taker will capture the thoughts, concerns and suggestions of the stakeholders. If the discussion is lively, each question should generate between five and ten sheets of flip chart pages of suggestions or comments. This is a significant amount of information for the organization to process. Therefore, it is important that the facilitator engage the participants in a priority setting or theme capturing exercise after each of the four questions have been discussed. The priority setting or theme setting process will help the organization identify, from the participants perspectives, the priorities, directions or next steps to be taken.

The information gathered from the facilitated discussion process can be utilized by the organization in a number of ways:

Knowledge and Understanding

Through this facilitated discussion process, the organization should be able to gain specific knowledge of community needs and expectations, potential service delivery requirements, and service levels. The organization should also be able to explore service gaps and better understand the perspectives of the stakeholder participants.

Utilization and Satisfaction of Service Being Delivered

The facilitated discussion process can also probe issues related to the utilization of the service or program and better determine whether the stakeholders are satisfied or dissatisfied with the service being delivered.

Evaluation of Service or Program

The facilitated discussion process can provide evaluation data for the organization from the perspective of stakeholders.

Determining how the organization plans to utilize the information generated from the facilitated discussion is important to discern in advance of the session and in framing the questions. The facilitated discussion will provide the organization with data which can be used to inform programs and services, provide evidence for funders and program sponsors, and provide information for staff and board members to consider.

The organization hosting the facilitated discussion should consider how the results of the discussion will be communicated. Below is a draft communication and integration strategy which can be adopted by the host organization.

Communications and Integration Strategy for Facilitated Discussion Results

- Consolidate the stakeholder information generated through the facilitated discussion process utilizing the reporting form
- Develop a one or two page report which can be circulated to facilitated discussion participants to ensure that their comments are accurately reflected
- Review the priorities or key themes identified by each of the participants
- Identify next steps or strategies which build on the priority or key theme areas identified during the facilitated discussion process
- Circulate report to internal audience at organization which might include staff, volunteers, board members, clients, program participants and ask for feedback
- Develop a final report which includes strategies
- Communicate or share final report with stakeholders including facilitated discussion participants, funders, sponsors, staff, volunteers, clients and others as appropriate
- Begin enacting the strategies for change

Final Thoughts

As the host organization for the facilitated discussion session, you play an integral role both in the recruitment of participants, hosting the discussion, collecting the notes and reporting. These sessions can provide your organization with valuable stakeholder perspectives on programs, services or activities which are being delivered.

The facilitated discussion format allows for and encourages full participation by all individuals invited to the session. It provides a focused approach and can be utilized by the host organization to review current programs, design new initiatives or generate evaluation and feedback from stakeholders.



Facilitated Discussion Report Form

Host Organization Profile:

Name of Organization: _____

Address: _____

Telephone: _____ Fax: _____

Organization Contact: _____

Email: _____ Web: _____

Name of Facilitator: _____

Name of Recorder: _____

Facilitated Discussion Topic or Theme: _____

How many Facilitated Discussions will you be hosting:
 One Two Three Four Five Six Seven more _____

Facilitated Discussion Date	Location	Prospective List of Invited Participants	Participant's Organization	Report Submission Date

Final Report Submission

- Participant Profile forms are attached
- Recorded Notes from the flip charts are attached
- Priority Ranking or Key Themes for each of the questions are attached
- Other material is attached (as appropriate).

**Facilitated Discussion: Volunteer Management
Practices Priority Ranking Sheet ...1/2**

Question	Priority Rankings
<p>Question # 1 - Insert Question.</p>	<p>What was the most useful/effective strategy or technique described by participants or what were the key themes raised through the discussion?</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 5.
	<p>What were some other issues or concerns raised during these discussions which might require further work, resources or information?</p>
<p>Question # 2 – Insert Question.</p>	<p>What was the most useful/effective strategy or technique described by participants or what were the key themes raised through the discussion?</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 5.
	<p>What were some other issues or concerns raised during these discussions which might require further work, resources or information?</p>

**Facilitated Discussion: Volunteer Management
Practices Priority Ranking Sheet ...2/2**

Question	Priority Rankings
<p>Question # 3 - Insert Question.</p>	<p>What was the most useful/effective strategy or technique described by participants or what were the key themes raised through the discussion?</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 5.
	<p>What were some other issues or concerns raised during these discussions which might require further work, resources or information?</p>
<p>Question # 4 – Insert Question.</p>	<p>What was the most useful/effective strategy or technique described by participants or what were the key themes raised through the discussion?</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 5.
	<p>What were some other issues or concerns raised during these discussions which might require further work, resources or information?</p>

Sample Participant Profile and Feedback Form

Below is a template for a participant profile and feedback form. The host organization may consider changing or revising this template as appropriate to capture information which will be useful to the host organization.

Date of Facilitated Discussion: _____
Location of Facilitated Discussion: _____
Topic or Theme of Facilitated Discussion: _____
Name of Participant: _____
Title: _____ Organization: _____
Address: _____ _____
Telephone: _____ Fax: _____
Email: _____

Sample Profile and Feedback questions to consider:

Please identify the sector your organization serves:		
<input type="checkbox"/> Arts and Culture	<input type="checkbox"/> Human Services	<input type="checkbox"/> Other
<input type="checkbox"/> Education	<input type="checkbox"/> Sports and Recreation	Specify _____
<input type="checkbox"/> Health	<input type="checkbox"/> Faith	
Involvement with Host Organization:		
<input type="checkbox"/> Staff Member	<input type="checkbox"/> Volunteer	<input type="checkbox"/> Board Member
<input type="checkbox"/> Client	<input type="checkbox"/> Program Participant	<input type="checkbox"/> Family of client
<input type="checkbox"/> Staff member of another organization		<input type="checkbox"/> Other

Continued on next page

How would you evaluate the facilitated discussion session:
(check as many as appropriate)

- I received an appropriate amount of information about the session in advance.
- I understood the questions presented.
- I was provided with enough information about each question to be able to effectively participate in the discussion.
- I participated in the discussion.
- I felt my thoughts were appropriately heard and recorded.
- I am feeling positive about the facilitated discussion.
- I am feeling negative about the facilitated discussion.

Please provide any comments or suggestions to the host organizations about the facilitated discussion or topics explored.

Thank you for completing the Participant Profile and Feedback Form. Should you have any questions, comments or concerns, please contact the host organization.