Personal and Public Involvement (PPI)

Preparing a Facilitators Briefing

This guide will provide an overview of what facilitation is and how to facilitate a session either in person or online. This may involve facilitating a group at a conference or online workshop where there is limited time available and there will be a requirement to feedback on key points. The facilitated session may be part of a wider project and the Involvement of participants through a facilitated session will contribute to a wider programme of work. The guide will provide the key steps to take when facilitating any of the above.

Background – facilitation styles

There are four distinct facilitation styles.
Any one or a mixture of these styles can be used to facilitate group discussion and achieve the aims of the session.

- **Directive**: giving people information, instructing them how to do something, such as: This is how to develop a work plan.
- **Exploratory**: asking questions, encouraging people to voice their experience and ideas, such as: What did you find useful in the last community group you were part of?
- **Delegating:** assigning tasks, roles and functions to individuals.
- **Participative:** taking part in discussion, sharing personal experiences and encouraging others to do likewise, such as The first time I ever did a skill-sharing workshop like this was …

Facilitating a session

Practical arrangements before meeting the organiser should:

- Identify facilitators well in advance of the workshop.
- Identify trained/experienced facilitators and pair them with new facilitators.
- Consider asking Service Users and Carers to co-facilitate if appropriate.
- One/two facilitator(s) for 8/10 people.
- Identify:
  1. role of facilitator;
  2. questions and format of the workshop, i.e. online break-out rooms;
  3. how feedback will be captured; and
  4. provide briefing on day of event and answer any questions.
- Send out a briefing and agenda before the workshop.
- Identify in advance a note taker to record the session.

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Before the group discussion:

The organiser should:

- Read and reflect on the topic planned for the session.
- Identify what resources are required to facilitate effectively, e.g. room layout, flip chart, pens or post it notes. If online has all participants received the online meeting links.
- Consider having a co-facilitator to manage the online waiting room and chat function.
- Develop a well-structured (yet flexible) plan for the session, building on your preferred facilitation style. This will include developing questions to support the group and encourage discussion on the particular topic.

Conducting the discussion session:

The facilitator should:

- Introduce yourself to the group as the facilitator.
- Clarify with the group the objectives/goals for the session and the amount of time available.
- Create an inclusive environment for group participants. Consider the room layout and ask participants to introduce themselves to the other participants.
- If online, inform participants to keep their audio on mute when not speaking and use the "raise hand" icon to raise questions or express an opinion. Give participants the option of keeping their cameras off.
- Ask participants for their consent to record the session. Everyone must be in agreement.
- Determine the existing knowledge levels of the group.
- Initiate the discussion with an engaging question or challenge.
- Highlight to the group they can insert questions or suggestions into the online chat function.
- Use mainly open-ended questions or comments.
- Listen actively and non-judgementally and encourage group members to do likewise.
- Keep the discussion from being dominated by one or two group members.
- Invite quiet participants to contribute.
- Paraphrase (restate) ideas and suggestions.
- Keep a watchful brief on the body language of participants, tempo of the session and introduce a comfort break if appropriate.

- Steer any conflict away from personalities and toward task-related issues.
- Before the end of the discussion, summarise the main points and check with the group that they are content that this reflects the discussion.
- Be aware of noise levels and if anyone has any difficulty hearing comments across large tables.
- Help to ensure good air circulation/quality is in the room you are using.

Feeding back discussion:

The facilitator should:

- Agree how notes will be recorded, i.e. via a note taker agreed in advance and use a flipchart to record the main areas of discussion. It may be helpful to do this under agreed headings.
- You could record the online conversation however you will need consent.
- Download and save the conversations in the online chat function.
- If the facilitated session is part of a conference or workshop proceedings, you may be asked to provide verbal feedback following the discussion:
  1. ask if any member of the group wishes to undertake this role (it will often be left to the facilitator, but on occasion group members may wish to provide feedback);
  2. present the agreed summary in a concise fashion. If some of the points have been covered previously by other groups, acknowledge that this is the case and add any additional points discussed by your group; and
  3. after providing feedback, ask the group if there is anything they would like to add.
- Share the notes with the event organiser.
- If the facilitated discussion is part of a wider project, ensure:
- participants know how their input will be used
- ensure feedback is provided to this group at a later stage, i.e. a project report.
- Ask participants to feedback into their own experience of been involved. Keep your feedback template short and to the point.

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Facilitators briefing - Template

Name of workshop: _____

Date: _____

Venue/Method, i.e. online: _____

Facilitators brief

Thank you for agreeing to facilitate a discussion during the workshop. This briefing will provide details on how to conduct the session.

- How will the workshop be structured?
- What will be available for facilitators – pens, feedback sheets, questions, relevant documents, online recording, co-facilitator to manage the online waiting room and chat function etc.
- How to meet needs of specific group - smaller number, more visuals, etc.

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Format

- How long will the workshop take?
- How much time is allocated to each question?
- How will feedback be recorded and presented?

Instructions for facilitators

- List what you want facilitators to do during the workshop session.

For more information on Involvement, Co-Production and Partnership Working
please visit the Engage website.

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