FACILITATION STRATEGIES FOR IG PROFESSIONALS

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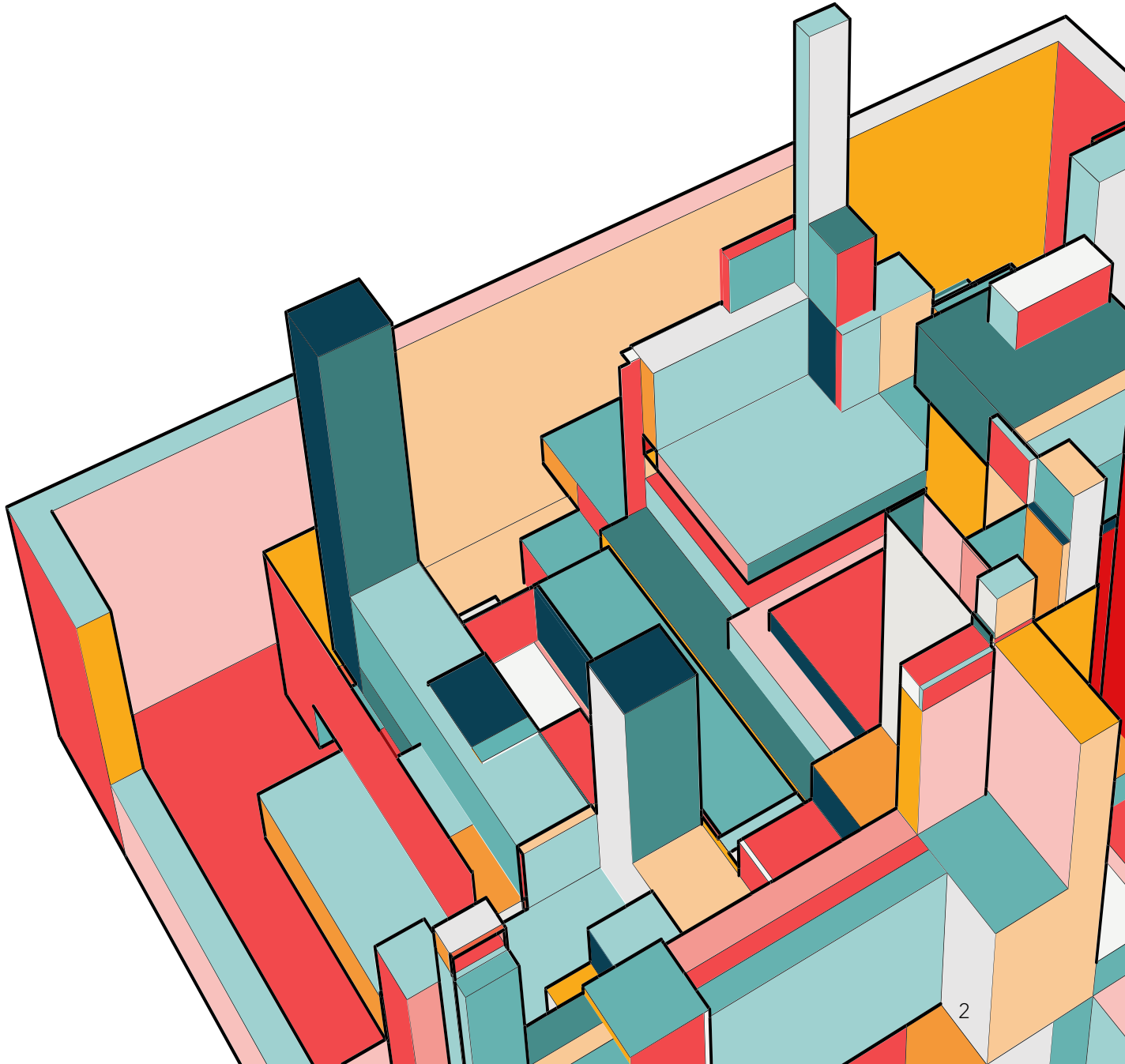
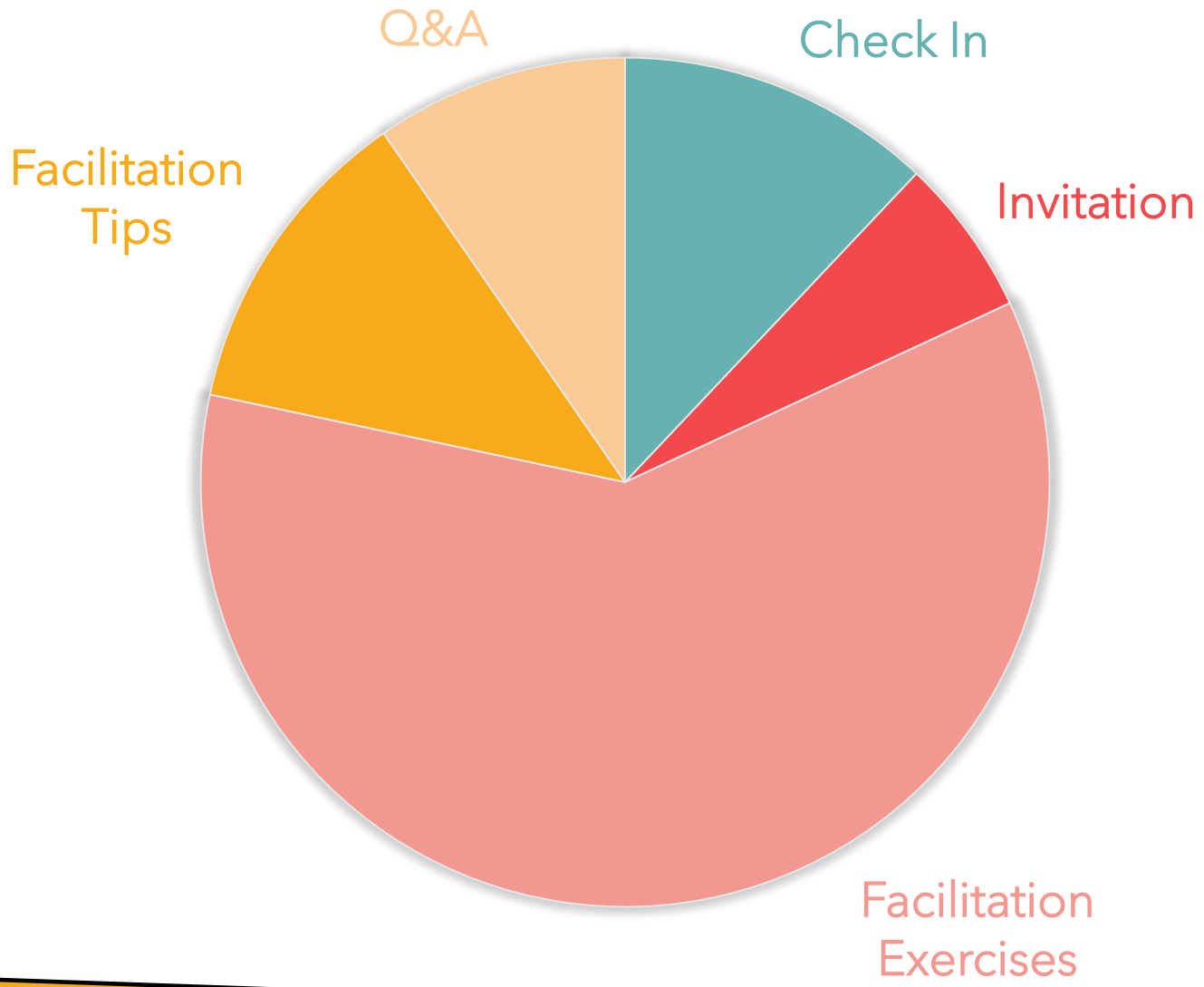
San Diego ARMA Chapter Meeting

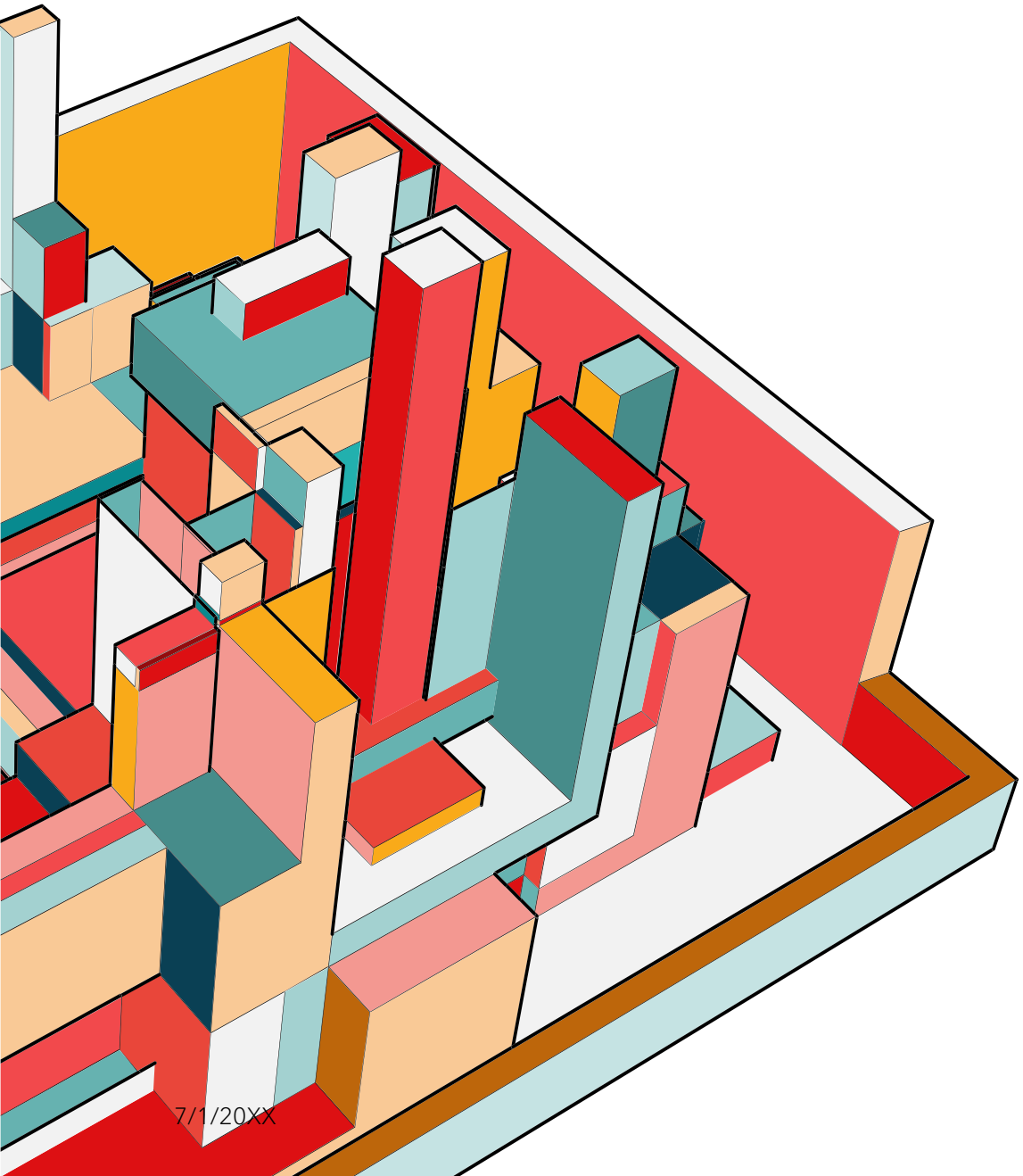
ABOUT ME

- Started my career in libraries and archives before transitioning to records management
- MA from UW-Madison in Library and Information Studies; Certified Records Manager (CRM) & Certified Information Governance Officer (CIGO)
- Was previously the Head of IG for all US offices at Withersworldwide, a global law firm; worked in the public sector for most of my career
- Am passionate about facilitation and have used facilitation techniques in some form or another in all my roles



AGENDA


Q&A
Check In
Facilitation Tips
Invitation
Facilitation Exercises

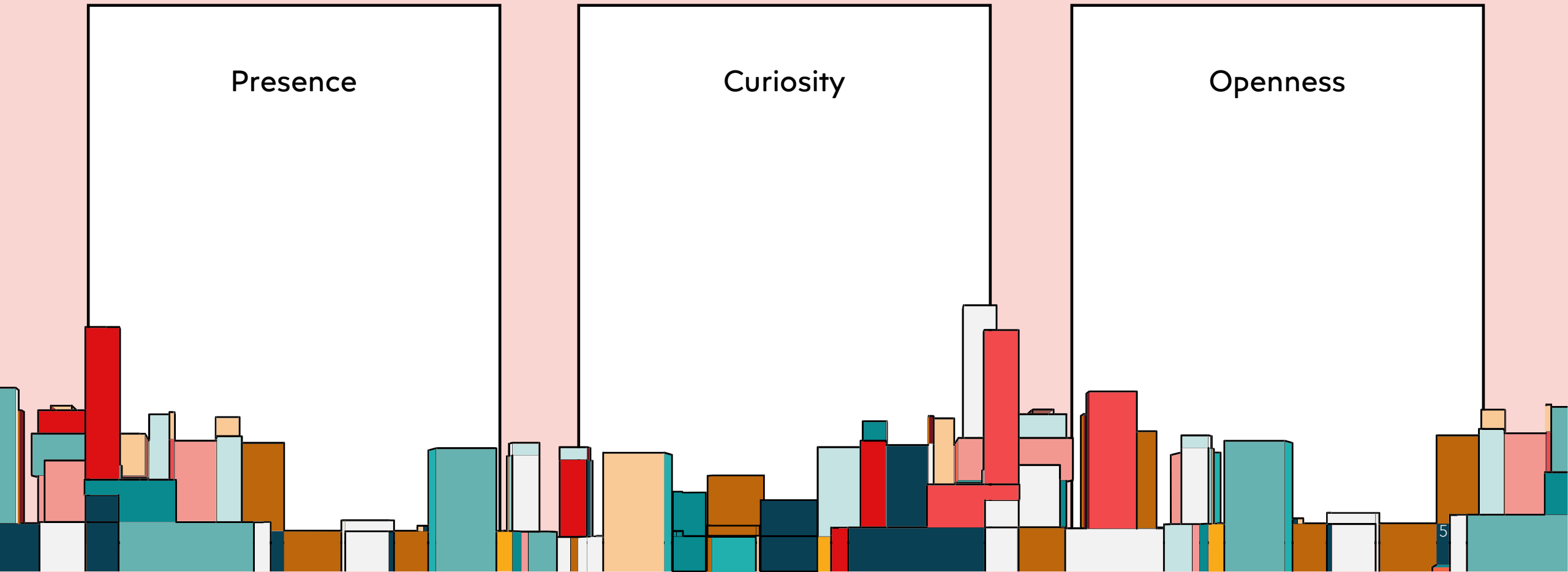


CHECK-IN

1. Your name/what you like to be called
2. Your organization & position
3. Your greatest hope for the session is….

THE INVITATION FOR TODAY

We cannot teach people anything; we can only help them discover it within themselves.
– Galileo Galilei



FACILITATION #1
TRIZ

Scenario

You are a group of IG, RIM, Department Personnel, Management, and IT stakeholders about to transition to a new records management software. IT is driving this initiative. The agency is interested in having a data set that is comprehensive, unified, and accurate.

Breakouts | Individual & Group Brainstorming | Reporting Out

- have fun role playing -

FACILITATION #1
TRIZ

Inviting Question:

How can we make sure we transition to a RM software that no one will want to use?

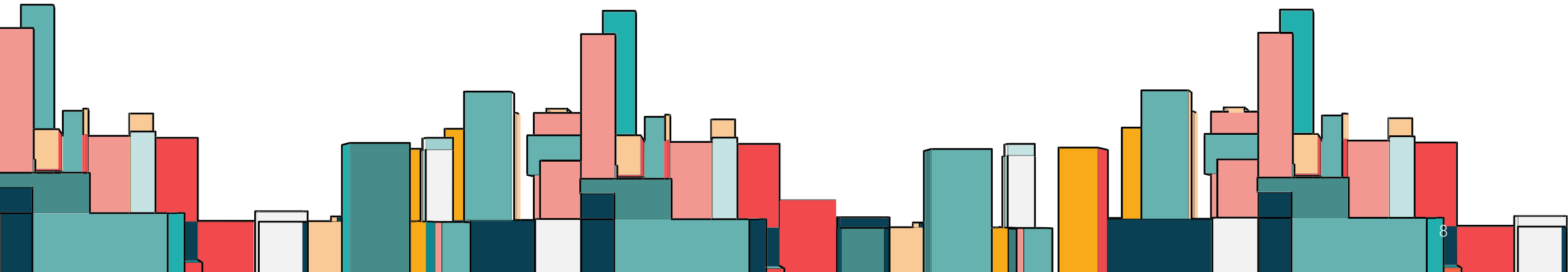
FACILITATION #1
TRIZ

How can we make sure we transition to a RM software that no one will want to use?

When in your groups today, answer from different perspectives – IG, RIM, Department Personnel, Administration, IT, etc.

Round 1: List all the group can do to achieve this most unwanted result.

- Start with a silent, individual brainstorm (1 min)
- Transition to brainstorming as a group (4 min)
- Star and report out one item when all together (1 min)



FACILITATION #1
TRIZ

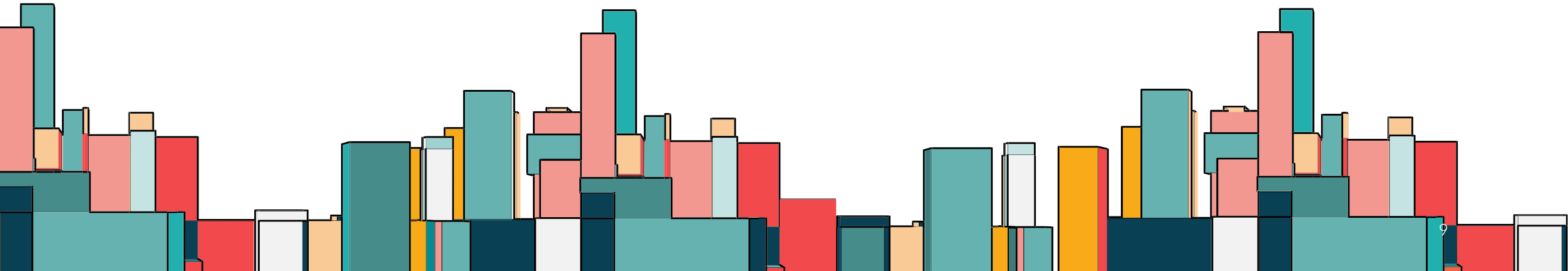
How can we make sure we transition to a RM software that no one will want to use?

Round 2: Make a second list of all that the group is currently doing that resembles items on the first list.

- Start with a silent, individual brainstorm
- Transition to brainstorming as a group

Round 3: For each item on the second list what first steps will help stop this unwanted activity / program / procedure.

- Start with a silent, individual brainstorm
- Transition to brainstorming as a group



FACILITATION DEBRIEF #1
TRIZ

A fun way to help groups clear space for new thinking

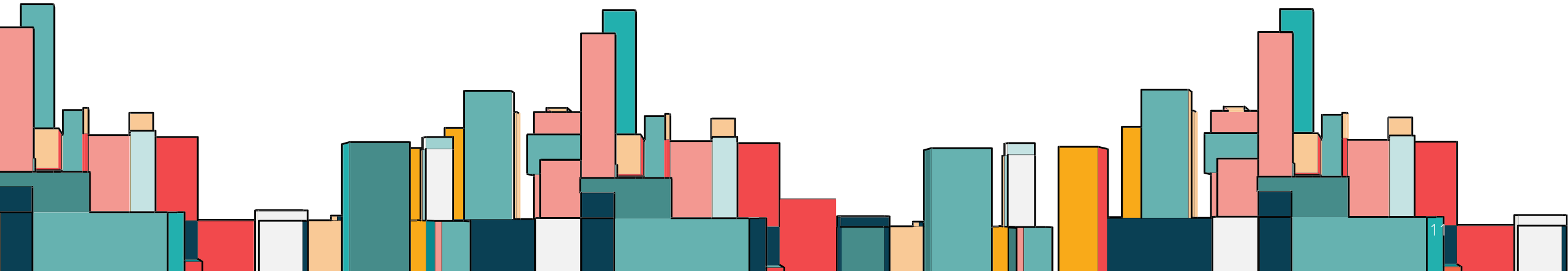
Makes it possible to engage with challenging topics

Builds trust and removes barriers using creative destruction

WHAT IS FACILITATION?

Helping a group collaborate across their differences to create change.

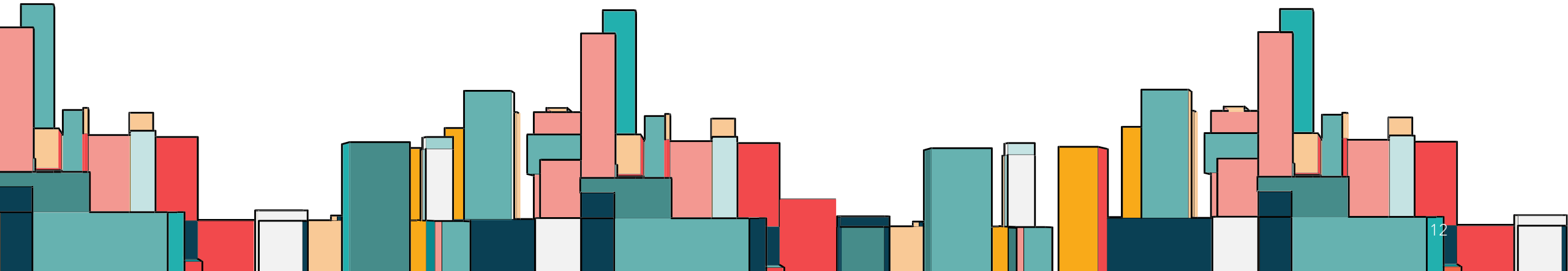
- Adam Kahane

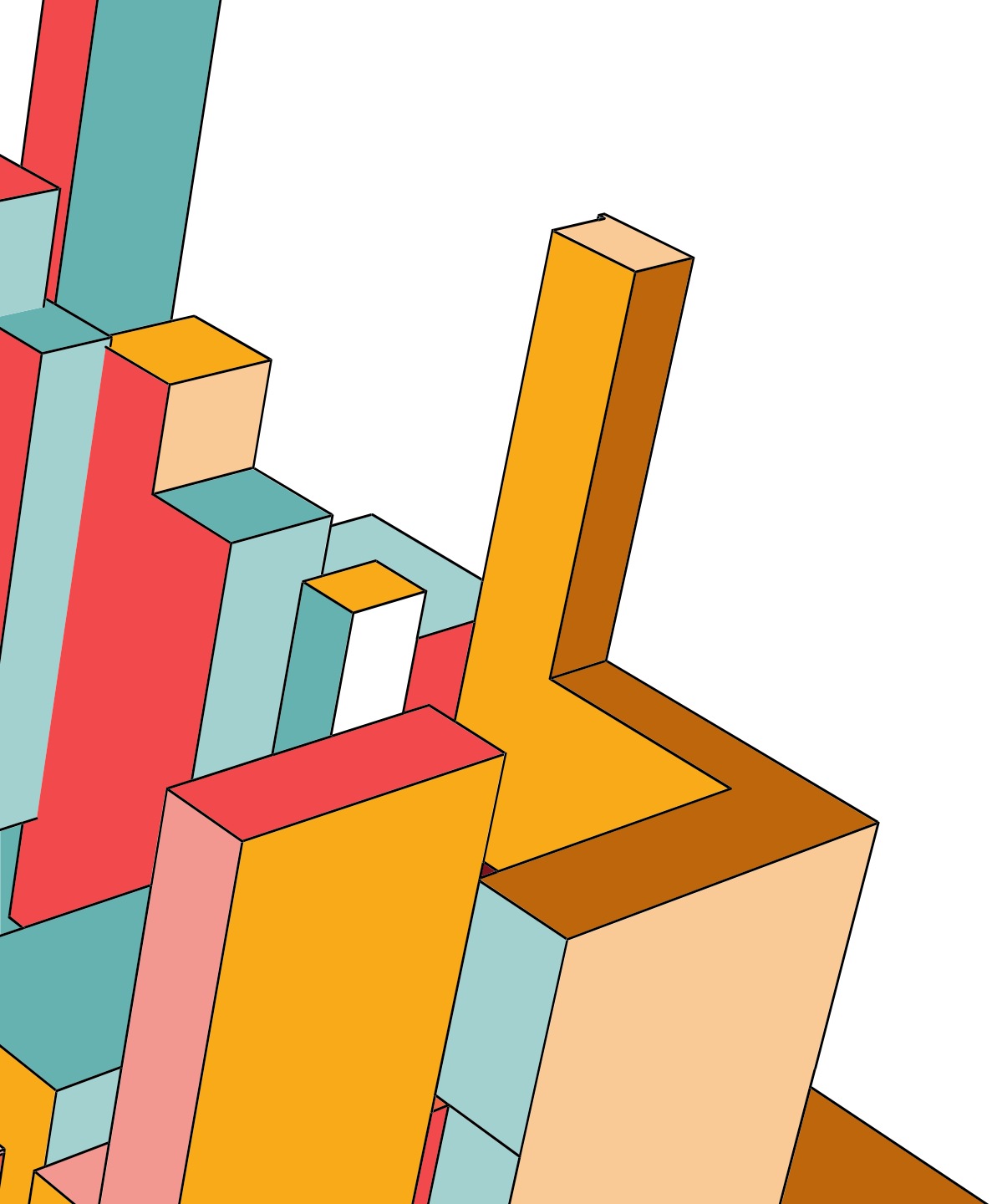


WHO IS A FACILITATOR?

Someone who takes responsibility to plan and manage the process that will help a group to achieve its goals.

- Technology of Participation





WHAT SKILLS ARE NEEDED TO FACILITATE?

- Create collaborative client relationships
- Plan appropriate group processes
- Create and sustain a participatory environment
- Guide group to appropriate and useful outcomes
- Build and maintain professional knowledge

- Professional Competencies,
International Association of Facilitators

FACILITATOR, EXPERT, OR BOTH?

Facilitator
Responsible for process

Expert
Responsible for content

Both
Puts on expert hat when needed

FACILITATION #2
HELP FROM COLLEAGUES

TROIKA CONSULTING

An opportunity to get feedback from colleagues while exploring:

Your challenge

The kind of help you need

Groups of 3

One participant = Client

Others = Consultants

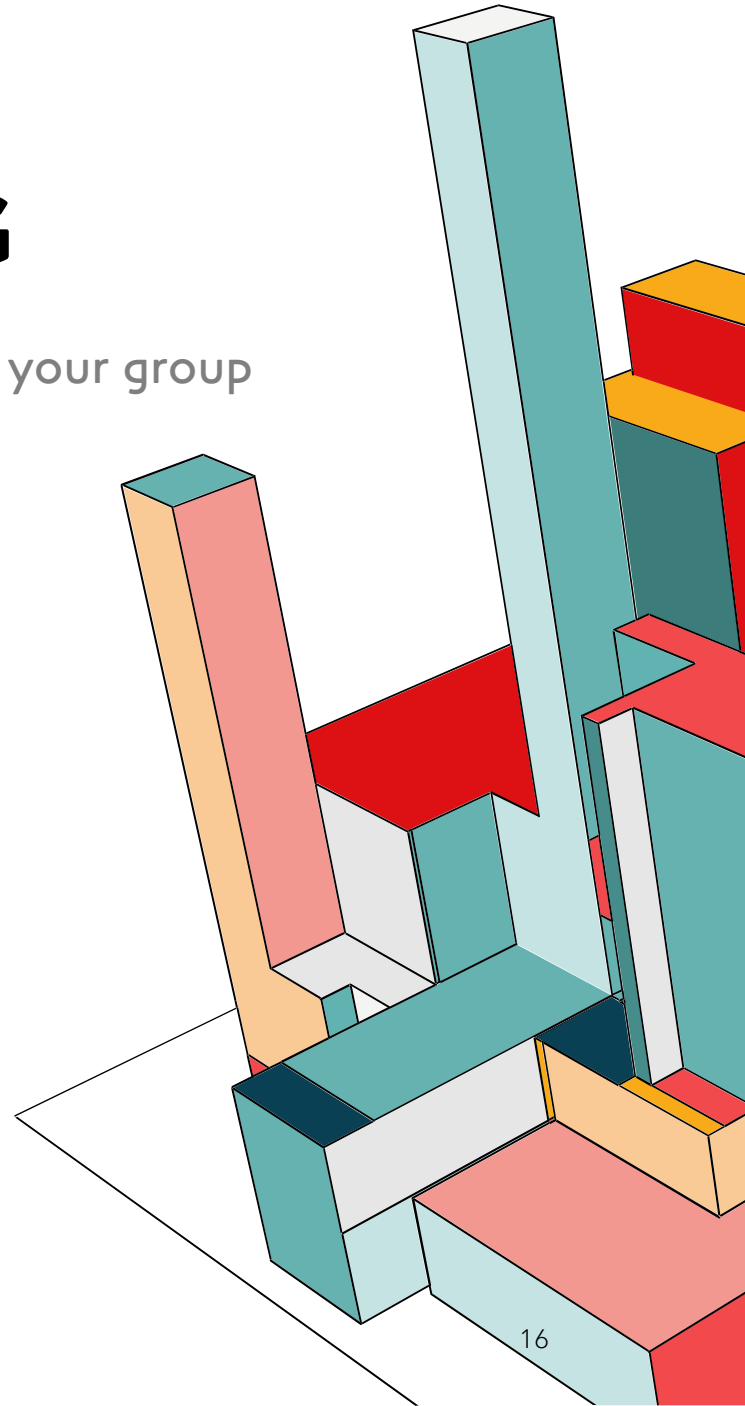
FACILITATION #2
TROIKA CONSULTING

1. Reflect on a consulting question you need help with and want to ask in your group

- Note the question down

2. In your breakout:

- Decide who will be the “client”
- We have time for only one round today
- Typically, all participants would have a chance to be the client
- Client asks their consulting question (1 minute)
- Consultants can ask one clarifying question each (2 minutes)
- Client turns back to camera/consultants
- Consultants provide coaching advice (3 minutes)
- Client shares most valuable feedback (1 minute)



FACILITATION DEBRIEF #2
TROIKA CONSULTING

Quick Peer-to-Peer Coaching

Develops listening and consulting skills

Builds trust & creates new pathways for action

FACILITATION #3

FOCUSED CONVERSATION

A structured conversation to access group wisdom

Developed by The Institute of Cultural Affairs

Co-creating together

Particpatory sense-making & decision-making

FACILITATION DEBRIEF #3
FOCUSED CONVERSATION

4 Stage Process
Objective
Reflective
Interpretive
Decisional
(ORID)

Inclusive
Provides opportunity for everyone to participate

Surfaces different understandings & insights
& moves toward action

FACILITATION #3
FOCUSED CONVERSATION

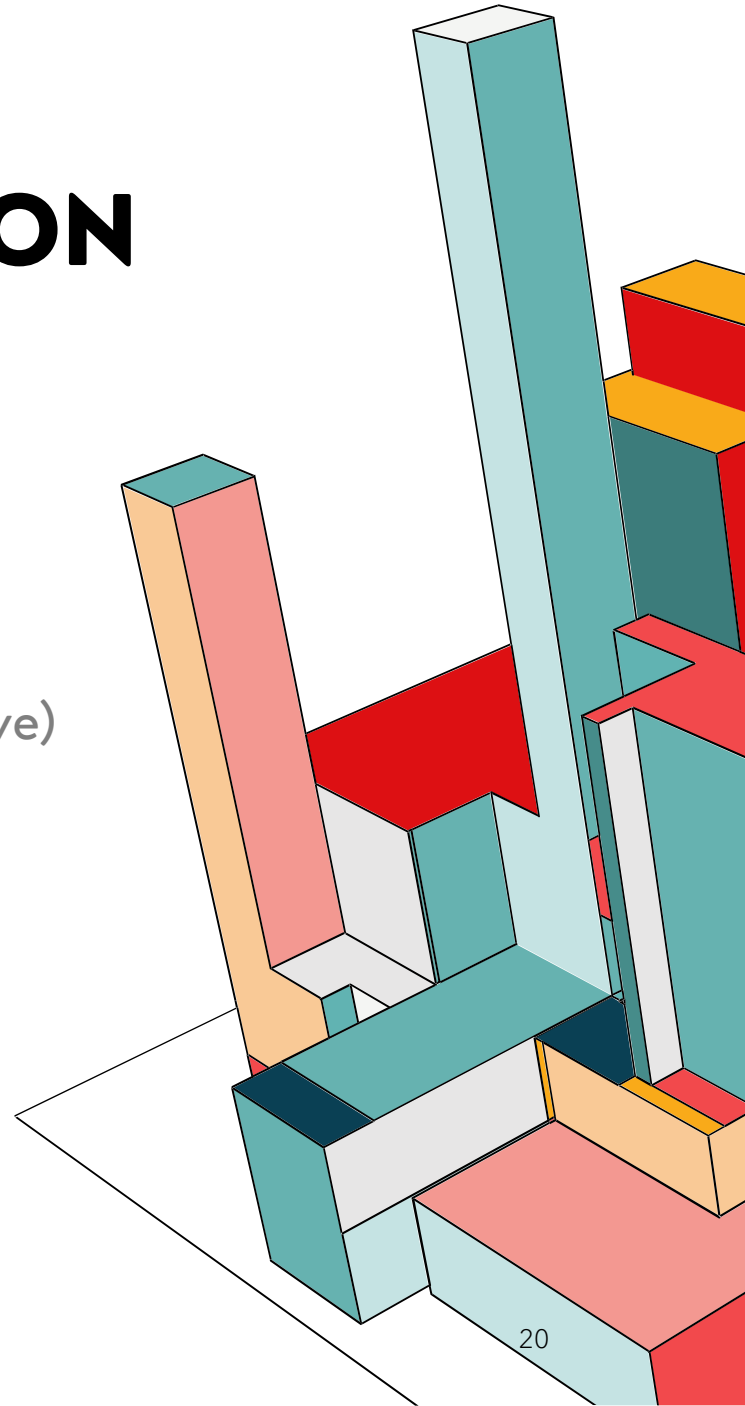
1. What do you remember from our session today? (Objective)

2. Where were intrigued? (Reflective)

3. Where were you turned off? (Reflective)

4. How did the session challenge or affirm the way you work? (Interpretive)

5. What could you do to bring some of the session's ideas to your organization? (Decisional)



FACILITATION TIPS

Map out the experience

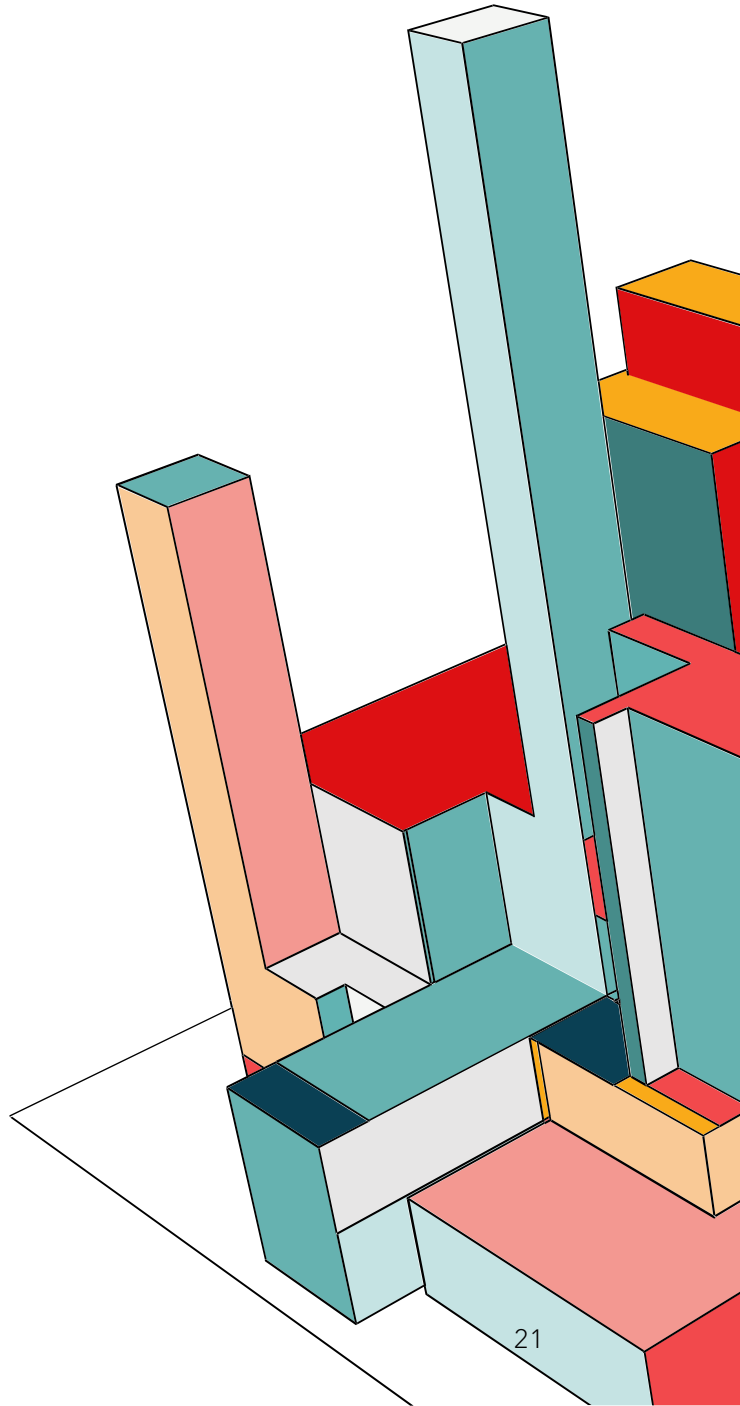
- Identify what needs to be accomplished – practical goal
- Identify what inner impact “emotional experience” you want the participants to have

Determine the structure

- Pick a tool or framework that will help meet the desired experience

Craft the inviting question/focus of the session

- Concrete vs. general ideas
- Creates group focus



FACILITATION TIPS

Understand group dynamics

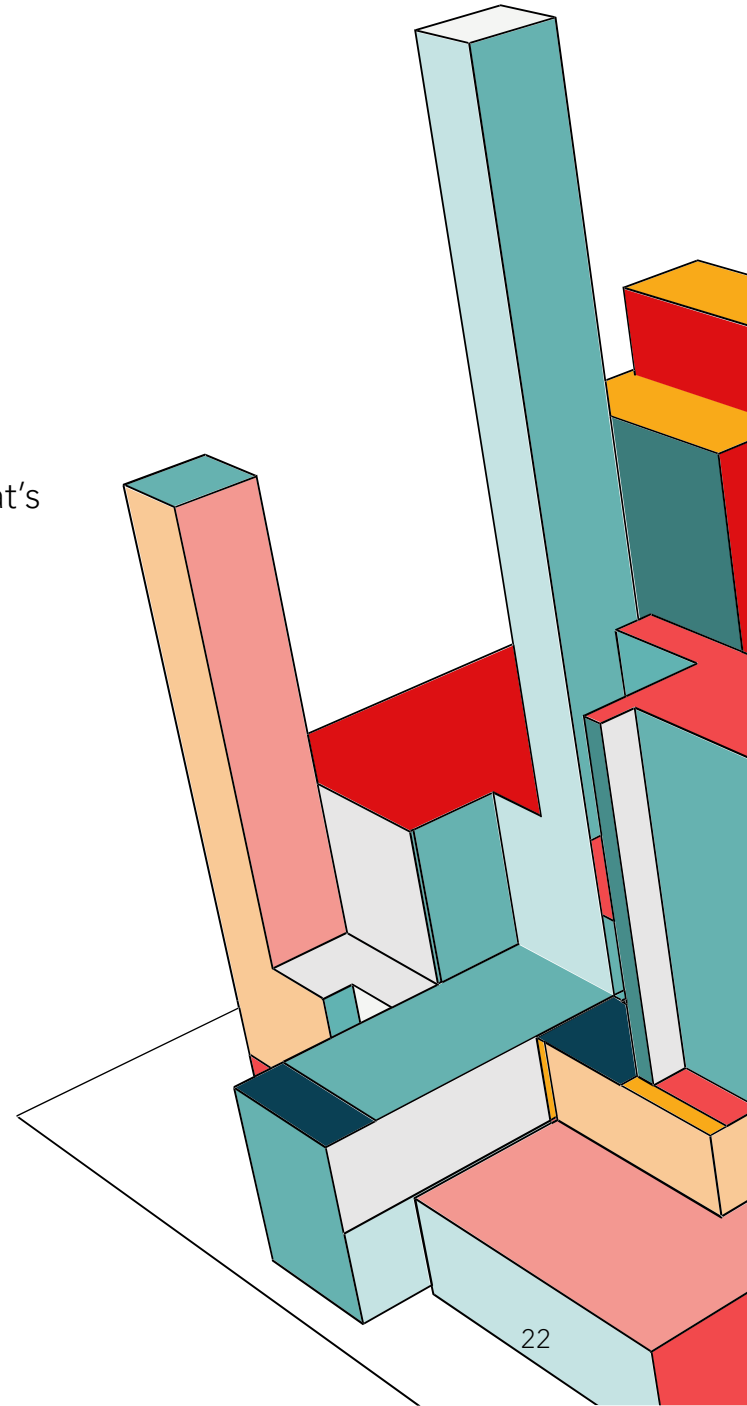
- Participatory processes involve a "groan zone" – it's normal, needed, and expected
- Sometimes just acknowledging the challenge of understanding diverse perspectives is all that's needed
- Other times additional techniques may be needed

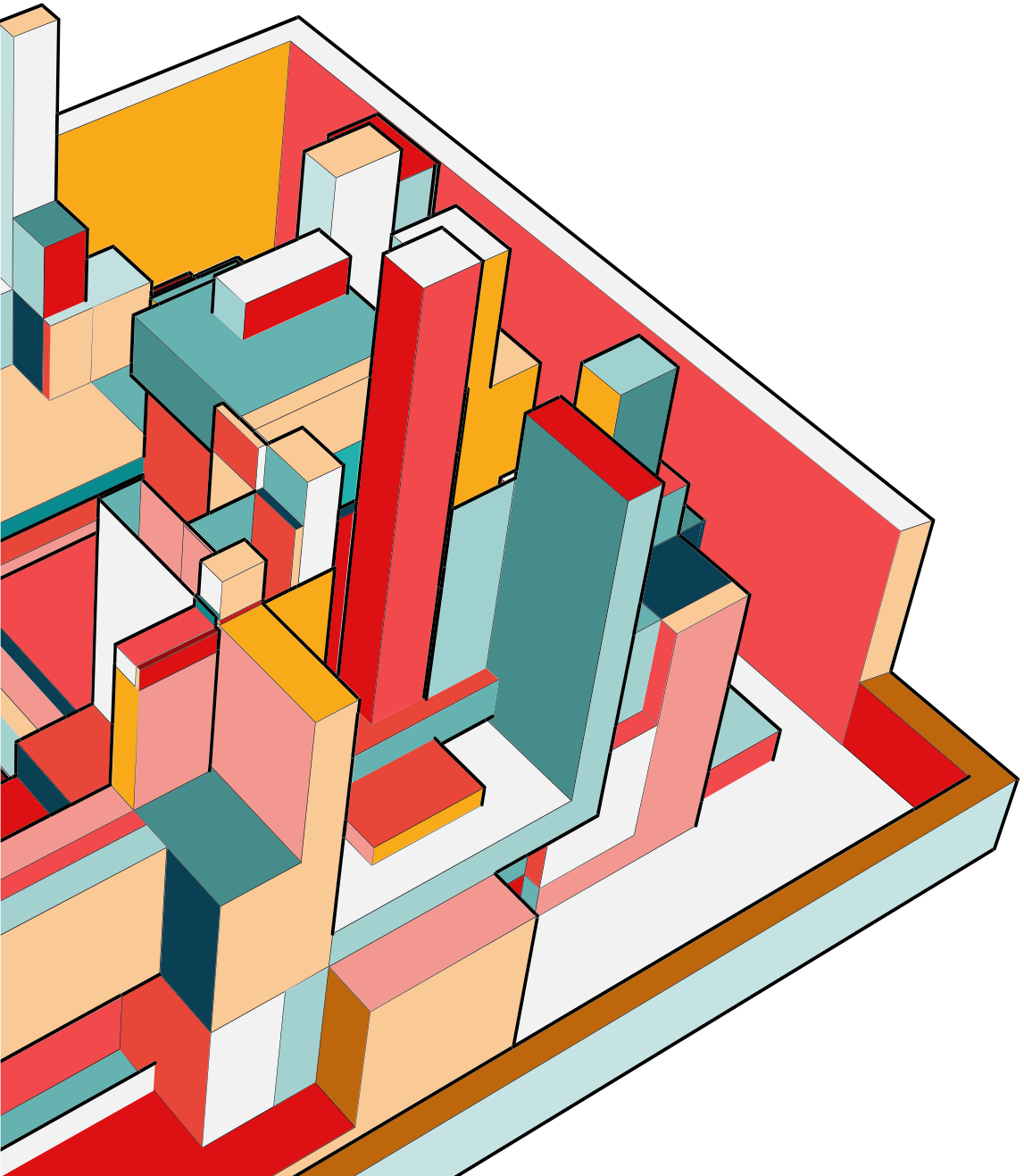
Trust the structure AND be ok with deviating when necessary

- Plan the conversation
- Know when to shift gears if needed
- Clarify the goals of session if helpful and don't be afraid to check-in with the group to see if the goals of the session need to change based on the emerging conversation

Allow the wisdom of the group to flourish

- Be present to what is emerging with the group
- Trust your instincts
- Facilitate the process not the content; notify participants when you are putting on your "expert" hat



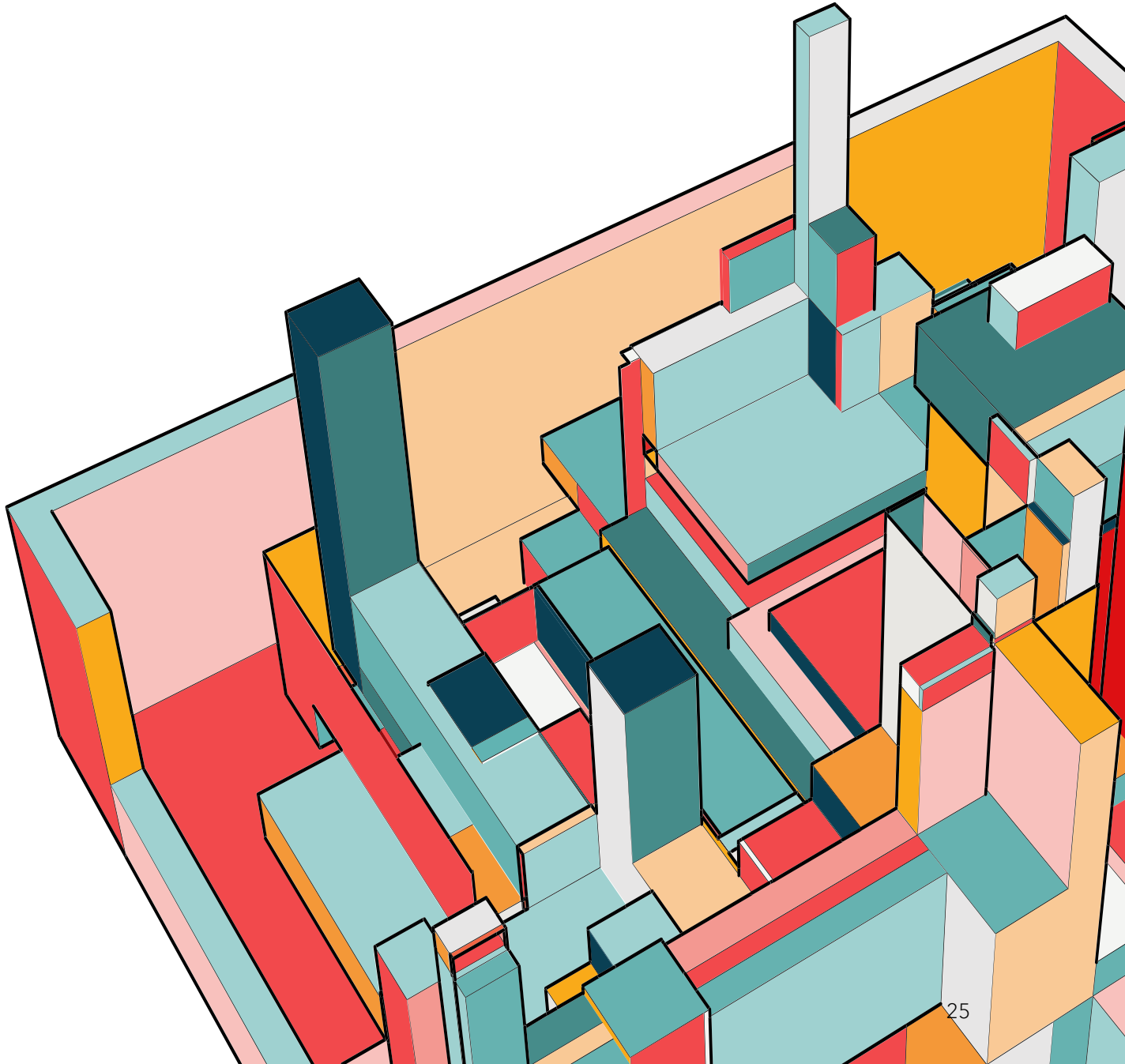


RESOURCES

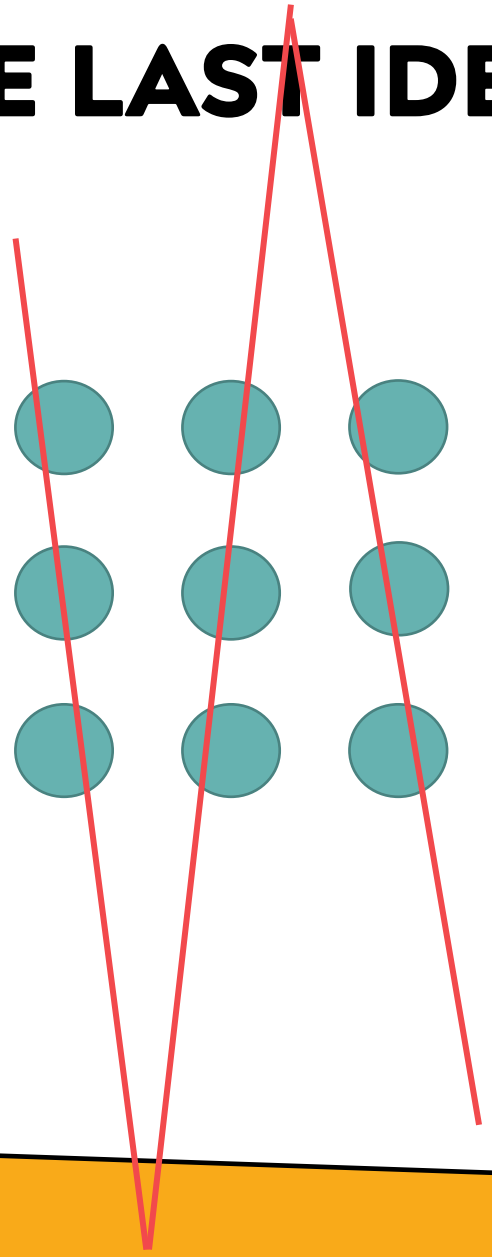
- Liberating Structures & LISA app
- Focused Conversation
- Technology of Participation (ToP)
- IAF
- Gamestorming
- Thinkertoys

CHECK OUT

One word to describe how you are feeling right now…



ONE LAST IDEA...



THANK YOU

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