

TALK ACTION



Facilitation: tools and techniques

Aims of the session

To develop our learning regarding how to:

- Facilitate enjoyable and effective meetings - face-to-face and on-line
- Clarify and explore the roles and responsibilities of the facilitator
- Equip our facilitator's toolbox
- Develop a useable session plan
- Use our toolbox to work through challenging situations

Agenda

Morning: learning the basics

1. Welcome, Icebreaker activity, Group agreement
2. Defining our terms
3. What does a good meeting look/feel like?
4. The facilitator's roles
5. The facilitator's tools and techniques

Afternoon: practising the basics

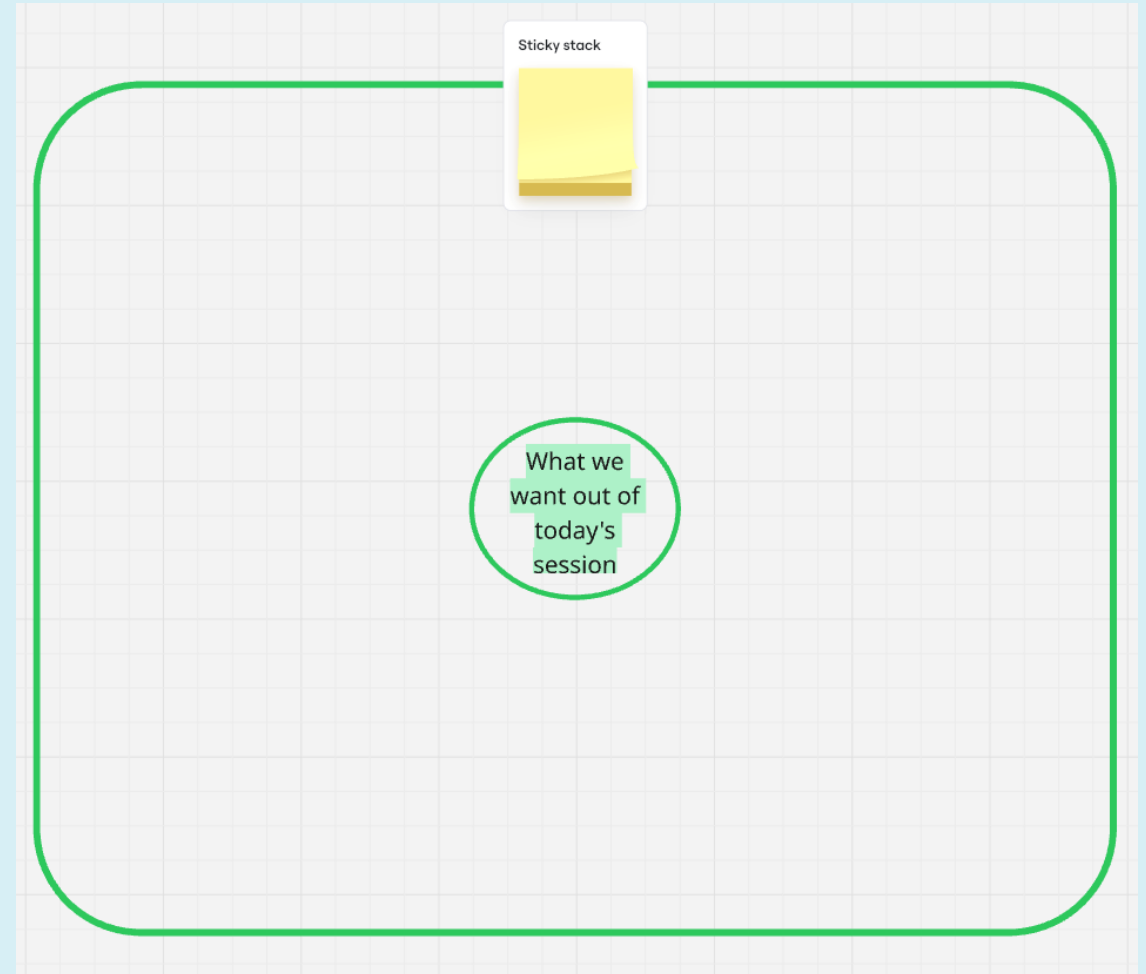
6. Writing our session plans
7. Role-playing strategies for dealing with challenges
8. An experiential and co-productive approach
9. Reflections and plans



Tech and Accessibility Check!

Note: Every word or phrase highlighted in yellow throughout these slides is a facilitation tool that I am using today and you can use in the future!

- Can you access the whiteboard?
- Do you need the closed captions option?
- Are you OK to stay unmuted?
- Feel free to use the chat window whenever you need to
- Any other accessibility needs/requests?



Tech prep – some pointers

- Make sure you prepare all your tech resources
- Check they work before the session starts
- What does your plan B look like if the tech falters/fails?
- Stay calm. It's OK 😊. People are generally understanding and forgiving
- The *principles* of good facilitation are always more important than the actual tools and techniques, so stick to those principles

1.

Welcome, Icebreaker activity, Group agreement



About me



**Reclaiming
the Future:
Basic Income and
Socio-Ecological
Transformation**



BIEN Congress 2024
29–31 August 2024
University of Bath,
England

The Basic Income
Earth Network (BIEN)
is a charitable, non-
profit, international
cooperation
organised with the
financial assistance
of the United Kingdom
Charitable Foundation
Number 1177046.

 **BIEN** Basic Income
Earth Network

1. Welcome, icebreaker, group agreement

Remember!
Yellow highlight means it's a facilitation tool

- **Introductions**
 - Your name
 - Your work/organization
 - Why are you here today?
 - **Icebreaker** - What's the worst meeting/facilitation experience you can recall?



Icebreaker

Questions:

- What *is* the 'ice'?
- Why does it need breaking?



Polyvagal Theory - An Intro

Ventral Vagal

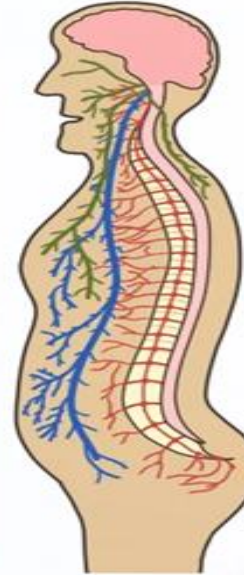
- Social Engagement Network
- Location: Face, throat, chest
- Ability to talk, engage, co-regulate, self-soothe and remain calm
- Top of the regulatory and evolutionary ladder

Sympathetic

- Fight & Flight (Mobilization)
- Location: Along the spinal cord
- Mobilize the body to fight, or run away from danger
- Increased heart rate, tense muscles, fast shallow breathing
- Middle of the regulatory and evolutionary ladder

Dorsal Vagal

- Freeze, Collapse, Dissociate (Immobilization)
- Location: Diaphragm, heart, gut
- Shut off from the threat, when can't fight or flight
- Decreased heart rate, low energy, depressed, numb, shut down
- Bottom of the regulatory and evolutionary ladder



@Ayan_Mukherjee_

Stephen Porges
The Pocket Guide
to The Polyvagal
Theory (2017)

Safety as deepest human need



Not the removal of threat...



...but the feeling of safety

TALK ACTION

This is...

A Safe &
CONFIDENTIAL
SPACE

Ice-breakers – some pointers

- **Exercise sensitivity** - It's meant to be fun and interesting not cringe-making! (Design it for the team)
- **Have a backup plan** - If it doesn't work, move on
- **For larger meetings consider breakout groups**
- **Don't do icebreakers for every meeting!** - If people know/trust each other already, the ice should melt, but...sense for tensions

When we encounter a **facilitation technique** we can highlight it in green and add it to our list on the whiteboard.

Breakout rooms

Let's use **active listening** in pairs. three minutes *each* to:

- introduce yourself
- share your facilitation experience so far
- share what you want to get out of today's workshop



But, what is **'active listening'**?



Active Listening

Listening well

Caring

Withholding judgment

Clarify and reflect

Summarise



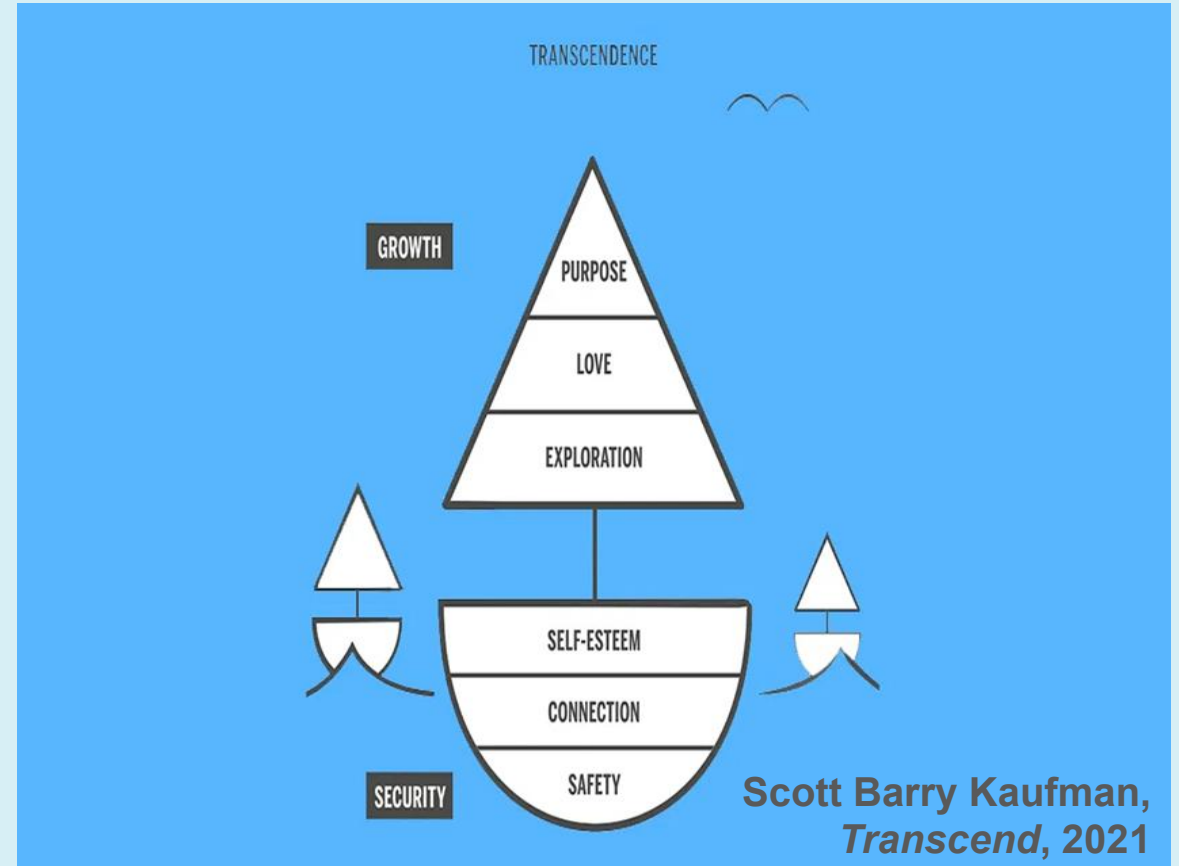
Feeding back to the whole group

- Each pair takes a turn to feed back to the whole group
- ZERO pressure to say anything you don't feel safe or comfortable saying
- Please record your wants on sticky notes on the whiteboard



Group agreement

- What do we all *need* to work well together?
- Head over to the whiteboard and drag your wants onto the corresponding need on the Sailboat



Group agreement

- Now, reflecting on our needs, let's write up a list of principles to agree on as a group to help us meet those needs together...

Group Agreement



On group agreements

- A group agreement really is invaluable
- Foundation for safety and trust
- Reference point
- An anchor in a storm
- Seeding a culture
- Supporting accountability and responsibility



2.

Defining our terms:
Tools, techniques, ...*and* principles



Tools, Techniques, and Principles

Tool

- An instrument used to perform a task



Technique

- A method or approach used to accomplish that task



Principle

- fundamental truths or propositions that serve as the foundation for beliefs, behaviors, or reasoning, guiding actions and evaluations.



Tools and techniques, ...*and* principles

- Today, we will use and explore a range of tools and techniques for use in effective facilitation practices both online and offline
- We will also co-create a list of principles that we believe underpin *all* forms of facilitation

3.

What does a bad/good meeting look/feel like?



Back into pairs

- Recalling your worst meeting/facilitation experience ever...
 - What happened?
 - What made it so bad, i.e. which **factors** contributed to creating this outcome?
- **Take three minutes each**

Note the technique (and principle!) of setting clear instructions and time lines!



Back into pairs

- No need to feed back
- Just record your factors on the whiteboard
- We've come up with a checklist for facilitating the worst ever meetings/workshops!



Back into pairs

- Now, if we think of the opposite of those factors...
- ...we've got a checklist for facilitating the best ever meetings/workshops!
- Let's write those on the whiteboard





Let's take a
10 min break!

4.

The facilitator's roles

Questions?

Which **tools** and **techniques**
have we used so far?

Can we identify any other
principles I have used so far?

Facilitation
tools

Facilitation
techniques

Facilitation
principles

Let's record them
on the whiteboard
now and from
now on...

The facilitator's roles

The facilitator's roles (and responsibilities)

- Two groups of three or four – five minutes to brainstorm...
 1. What *are* the roles (responsibilities) of the facilitator?
 2. What are *not* the roles (responsibilities) of the facilitator?

Afterwards, record your answers on the whiteboard



The facilitator's roles



Designer



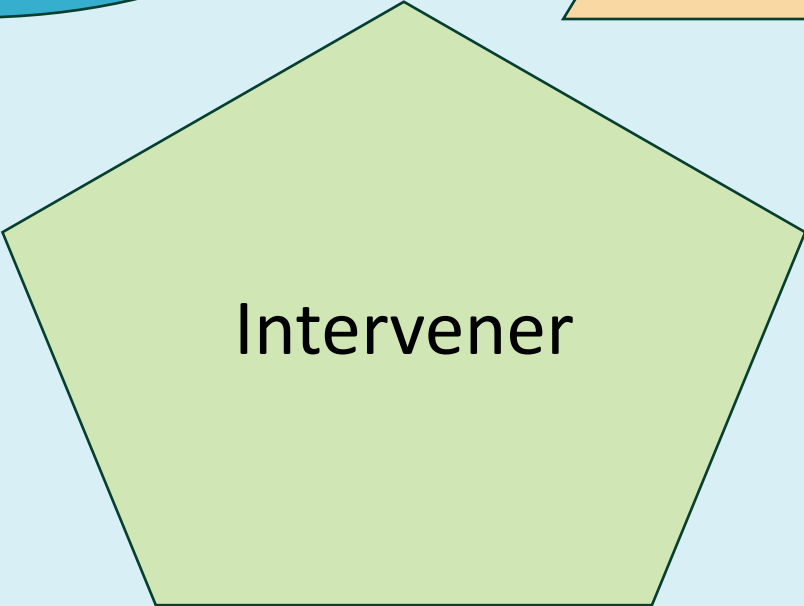
Recorder



Monitor



Supporter



Intervener

The facilitator's roles

Designer

- Scheduling
- Grouping
- Directing
- Programming

Recorder

- Wall-writing
- Paper management
- Keywording
- Photo reporting

Monitor

- Observing
- Analysing
- Evaluating

Supporter

- Resourcing
- Housekeeping
- Harmonising
- Gatekeeping

Intervener

- Guiding
- Balancing power
- Reflecting
- Clarifying
- Focusing
- Timing

5.

The facilitator's tools and techniques

The facilitator's tools and techniques

Which tools and techniques are we already familiar with?



Do you know this
one?
Check it out on the
whiteboard!

The facilitator's tools and techniques

Let's brainstorm a list of facilitation tools we've used/experienced on the whiteboard...

I can add a few more if needed



Facilitation
tools

Facilitator tool - Carousel

- Group knowledge co-production
- A small number of different themed stations
- Small groups take turns to sit at each station, brainstorming responses and ideas on that theme



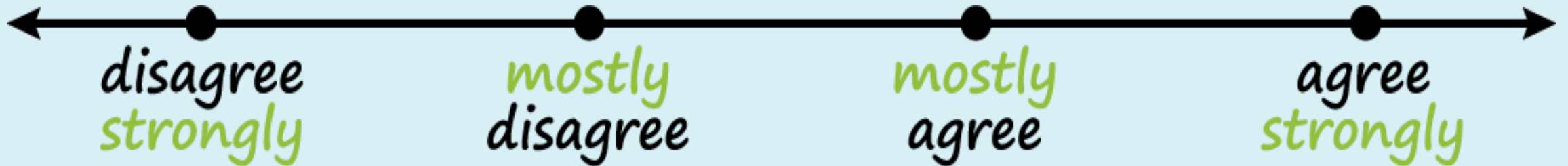
Facilitator tool – Margolis Wheel

- Participants form an inner and outer circle facing each other
- Pairs (one from inner, one from outer circles) discuss a topic together
- After an allotted time, the inner or outer participants move along

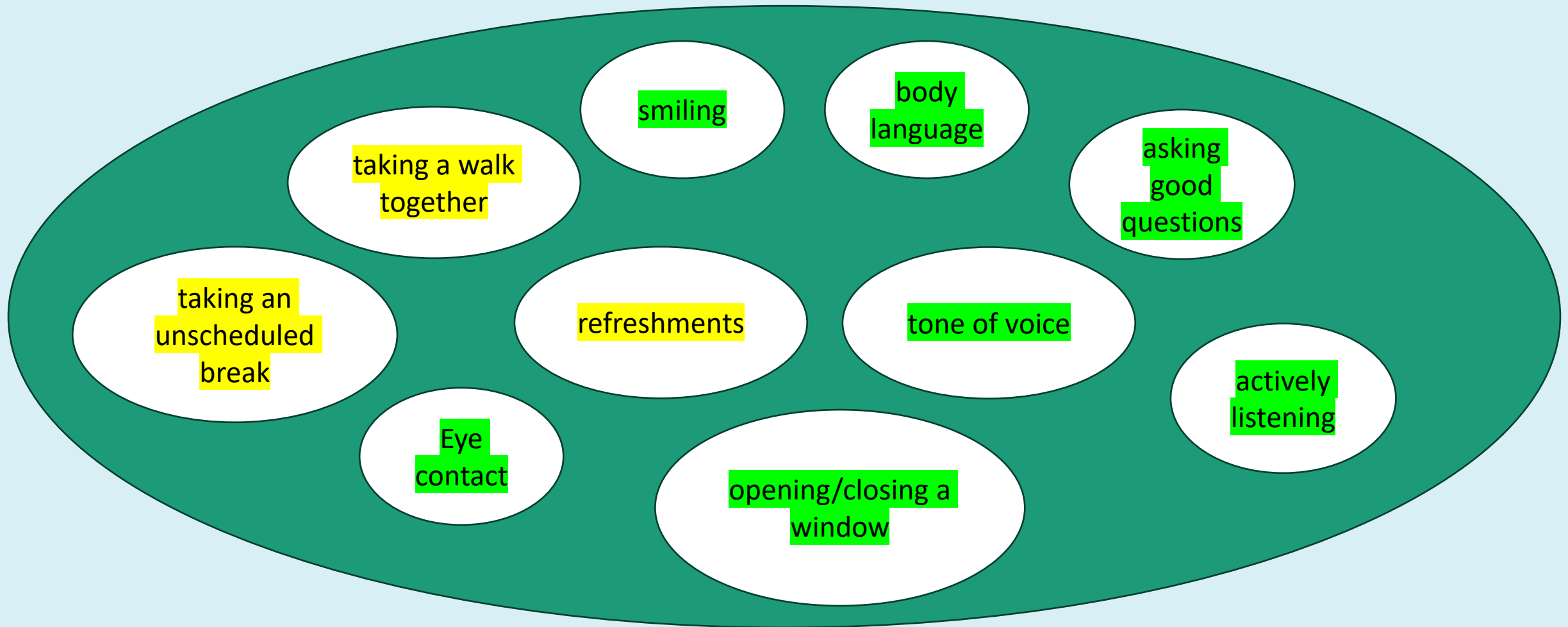


Facilitator tool – Spectrum Line

- A symbolic line is drawn across a room representing a spectrum of ideas
- Participants move to the point on the line which best represents their stance, discuss the reasons for their position, then reconsider their standpoint on hearing other views.



Informal tools and techniques are just as important



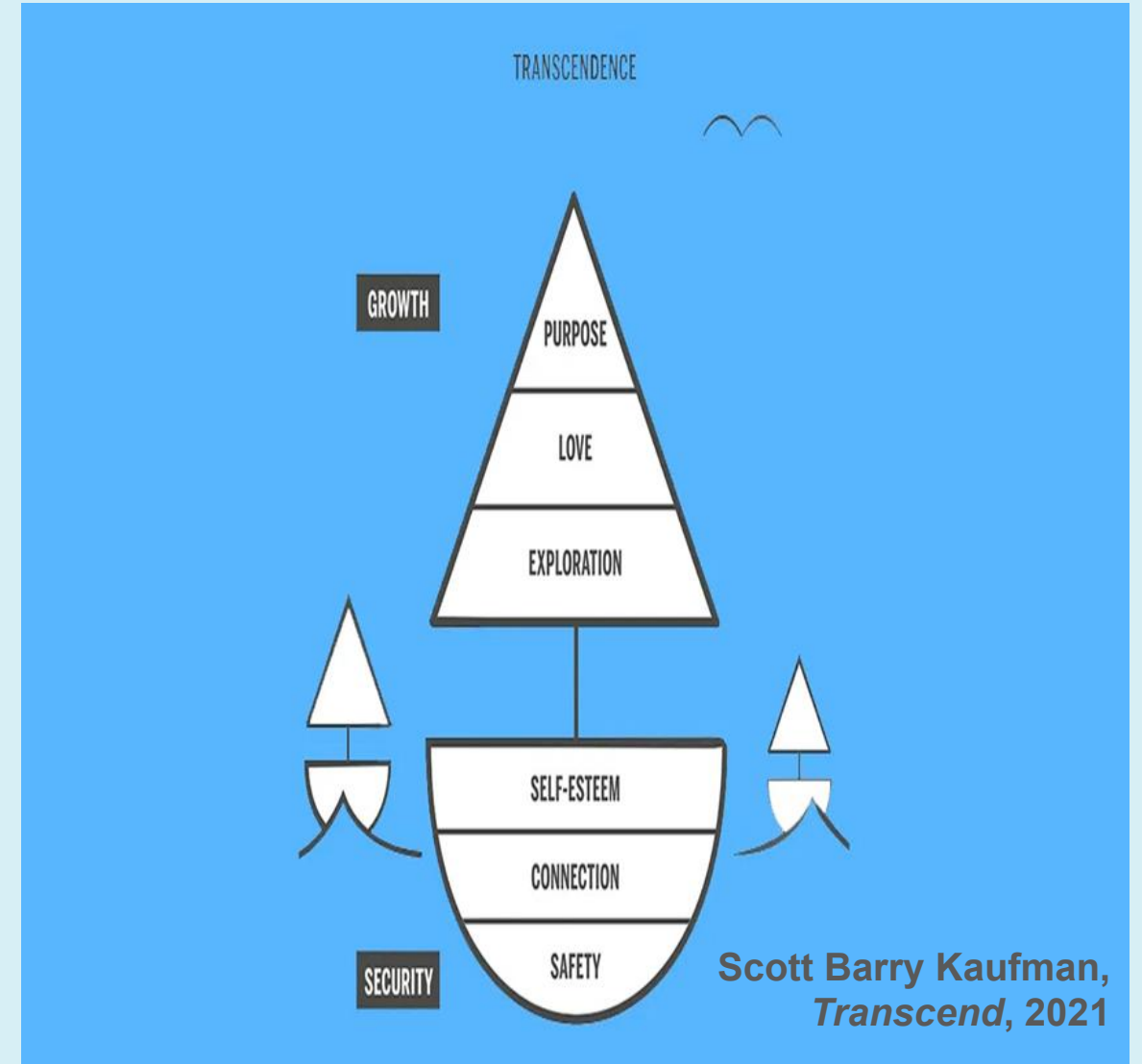
This is where the facilitator must *sense* the mood, the energy of the group.

Key principle recommendation: thinking carefully whether you need one or two people to facilitate a particular group/meeting/event

Reflections

- Looking at our wants & needs from the day, how's it going so far?
- So vital to **get real-time feedback!** We don't have to wait till the end!
- Feel free to use the chat

Top tip: **Trust your senses!** How does the energy in the room *feel*? Respond to that!

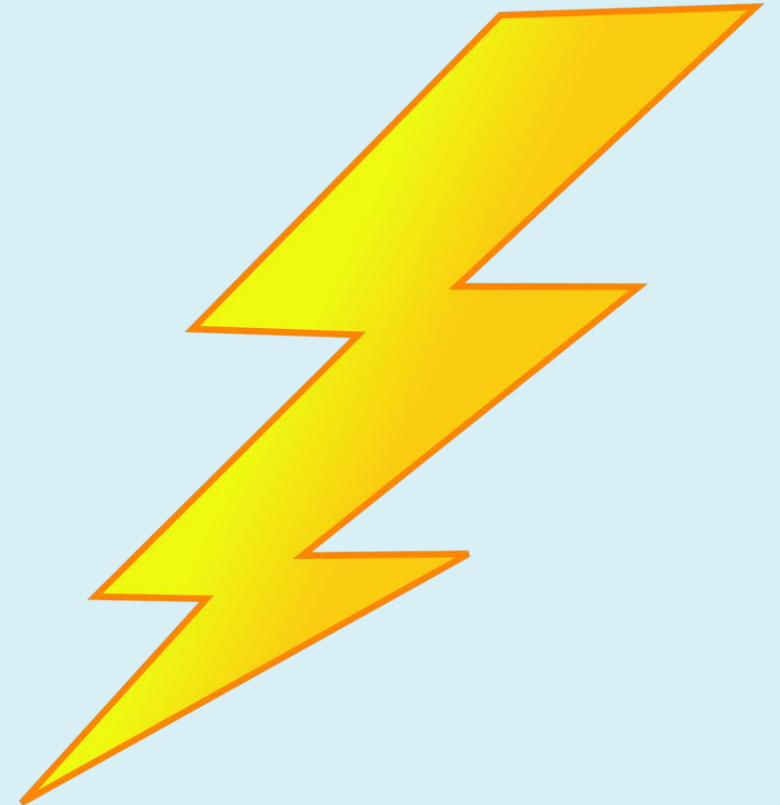




Lunchtime!

Post-lunch energizer!

- Move the body
- Get people smiling and laughing
- Play isn't just for children
- Be brave!
- Check out [Games, Games, Games](#)



6.

Writing our session plans

Let's write a part of a session plan

Check out the session plan document

Facilitation Plan for Anon Reflections Day, Sunday 29th February, 2026

Facilitators:

- Maria Franchi
- Joel Lazarus

Aim: To help the Anon community to connect, understand each other, play together, and develop more effective communication practices and processes.

Resources Needed

- Lego bricks, [lego](#) instructions printed and cut out, flipchart paper/pens and [post-it](#) notes, Max-Neef Wheel, Seed of peace cards, Sailboat print out

Session Plan

Session runs from 0930 to 1600

Preparation ahead of session

- Joel to create google form and produce and print out word clouds of the responses.
- Joel to stick them up on the wall before participants arrive
- Maria to write up the day's plan before they arrive

⊕

Time	Activity	Details	Timings (mins)	Lead facilitator	Slide no	Resources
0930 – 0940	Welcome and intro	<ul style="list-style-type: none">• Very short self-intro and then intro to the day (Slide 2)• A few mins of warming up the body	10	Joel	1 & 2	Flipchart showing the day's plan
0940 – 0950	Actions game	<ul style="list-style-type: none">• Person in middle guesses who is starting the action	10	Joel		
0950 - 1010	Toilet game	<ul style="list-style-type: none">• Everyone spreads their chairs around the space. Chair no = n+1• Play the game with occasional and final reflections on performance	20	Joel	3	Chairs and adequate space.
1010 - 1030	What do we need to make this a really fruitful day?	<ul style="list-style-type: none">• Explain active listening• Get into pairs – 5 mins each• Write what we need onto post-its• Explain safety as deepest need	5 10 5	Maria	4 5	Post-its
1030 - 1050	What are our...	<ul style="list-style-type: none">• Explain needs versus satisfiers	10	Maria	6-7	Print out of the Sailboat

Checklist for choosing the right tool for the right task

- Task – What are you asking the group to do?
- Aim – Why are you asking them to do it?
- Context – Where does this tool fit within the wider meeting process?
- Time – How long have they got to complete the task?
- Roles – Should they appoint someone to take notes or feedback?
- Materials – Which materials do they need?
- Space – Which rooms/tables are available for the activity?

What does good preparation look like?

Designer

- Scheduling
- Grouping
- Directing
- Programming

Preparation, preparation, preparation

Example aims and objectives

Key design principles:

- Know who 'they' are – get as much information as possible in advance
- Be clear on the purpose (the desired aims and objectives) of any facilitation work in advance
- Ask: is what they say they want what they really need?

Aim: To help the Anon team to come together to reconnect, rebuild morale, revive organisational optimism, and reenergise as a team.

Objectives:

- Reflect on the challenges of 2025 in order to move forward constructively
- Engage and explore together as a way of energising the team in our new structure
- See each other and the team in new and positive ways
- Reflect on current communication practices and generate principles and ideas for clarifying and improving these practices

Preparation, preparation, preparation

Designing

- Scheduling – the art of maintaining forward momentum without making people feel pushed
- Directing – avoiding (excessive) surprise without predetermining unpredictable outcomes

time	objective	activity	timing	resources
6 - 6.10pm	Welcome and introductions (Maria)	Fill out wordcloud - What are the obstacles to sustainable action for LWA	15 mins	Slide 1 wordcloud
6.10 - 6:20	Active listening (Joel)	listening exercise - what do you need to engage with this training session? Feedback - Group agreement	10 mins	Slides 2 and 3 Break out rooms - pairs
6:20 - 6:30	Recap and Agenda (Maria)	What do you remember?	5 mins	Slides 4-6
6.35 - 7:05pm	Reflection - what are the obstacles and why are they there? (Joel)	work through one as example pairs or threes - look at one obstacle each and take turns to speak, listen and ask curious questions - what is causing the obstacle? Use the why questions to get from the position to the needs. Feedback into a list - interrogate a bit - extra why??	5 mins 15 mins 10 mins	Slide 7 & 8 (Wordcloud of obstacles)
7.05-7:10	Break			

Online versus in-person facilitation?

- What are the key differences and similarities between online versus in-person facilitation?
- 10 min discussions in small groups
 - Which context are you most commonly working in?
 - What are the main challenges of each context?
- Then feedback to the whole group



OK. Take 15 mins to write some of your session plan

- Write as much as you can
- After 15 mins, share your session plan with your partner
- Give constructive feedback
- Then we can come back as a whole group and reflect on the task

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1030 - 1050	What are our...	<ul style="list-style-type: none"> • Explain needs versus activities 	10	Maria	6, 7	Print out of the Sailboat



Let's take a
10 min break!

7.

Strategies for dealing with challenges

Strategies for dealing with challenges

- Let's revisit those worst experiences we listed this morning.
- Can we work together to use facilitation techniques to deal with these worst-case challenges?
- Let's use **role play** to rehearse these scenarios

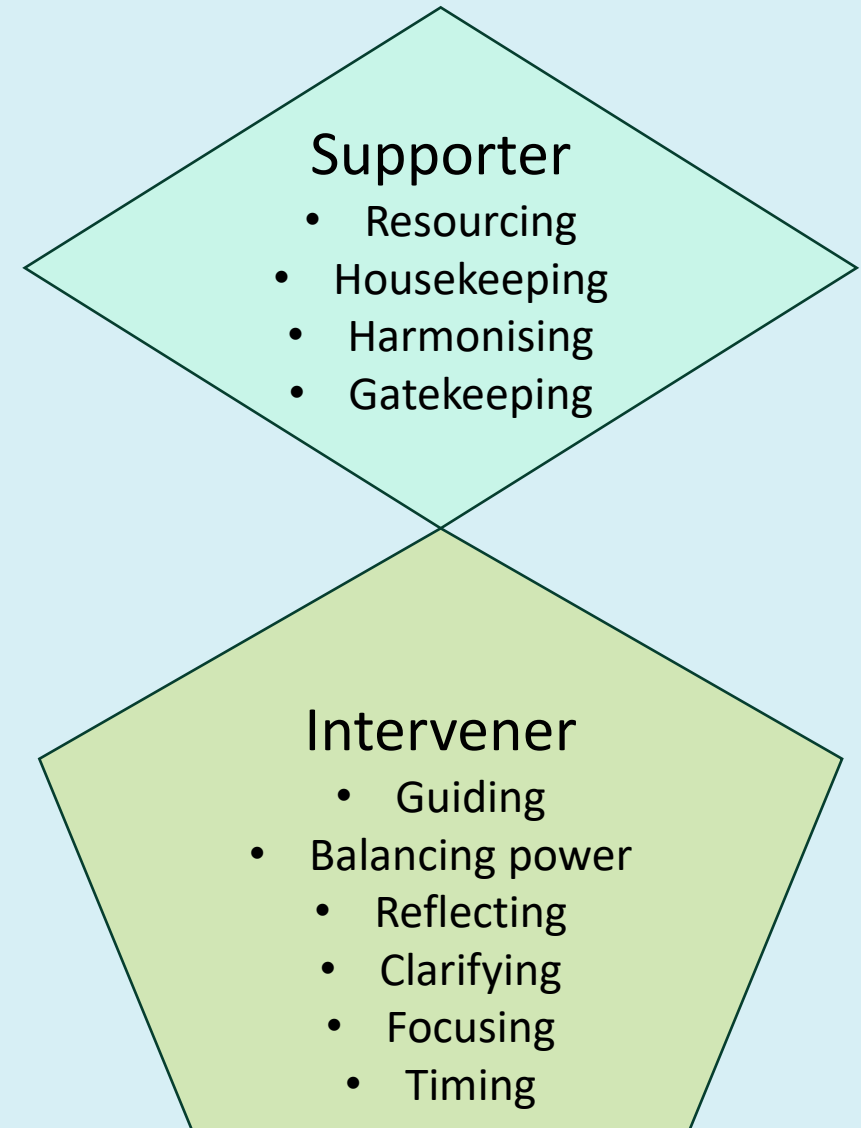
Role-playing our scenarios

- Get into groups of four or five
- Allocate roles
- Play through the scenario and discuss
- **Forum Theatre** - if you have an idea for how to better deal with the challenge, just tag the person playing the facilitator and give it a go yourself!
- It's totally OK to take the role of observer!



Tips for using role play

- Wonderful for embodied, experiential learning
- Rehearsing for reality
- No acting skills required. Everyone can do it.
- Everyone has different learning styles. Some of us love role play; others loathe it
- Balancing discomfort (where learning happens) versus unsafety
- Invite reluctant participants to give it a go. Offer them the role of observer

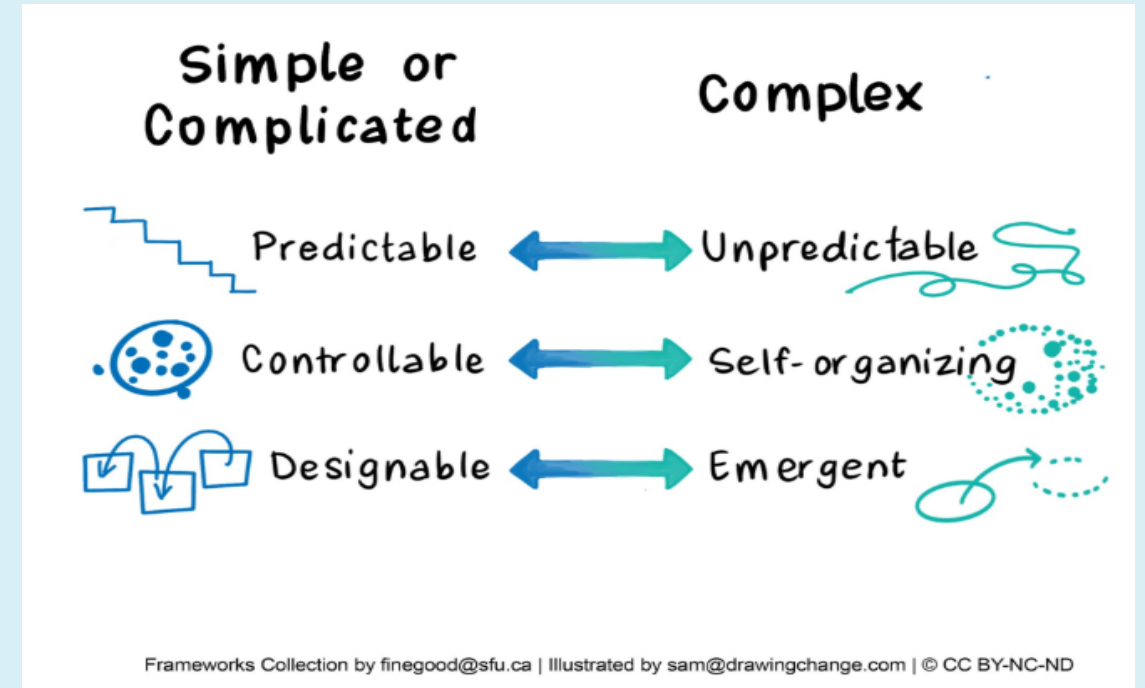


8.

An experiential and co-productive approach

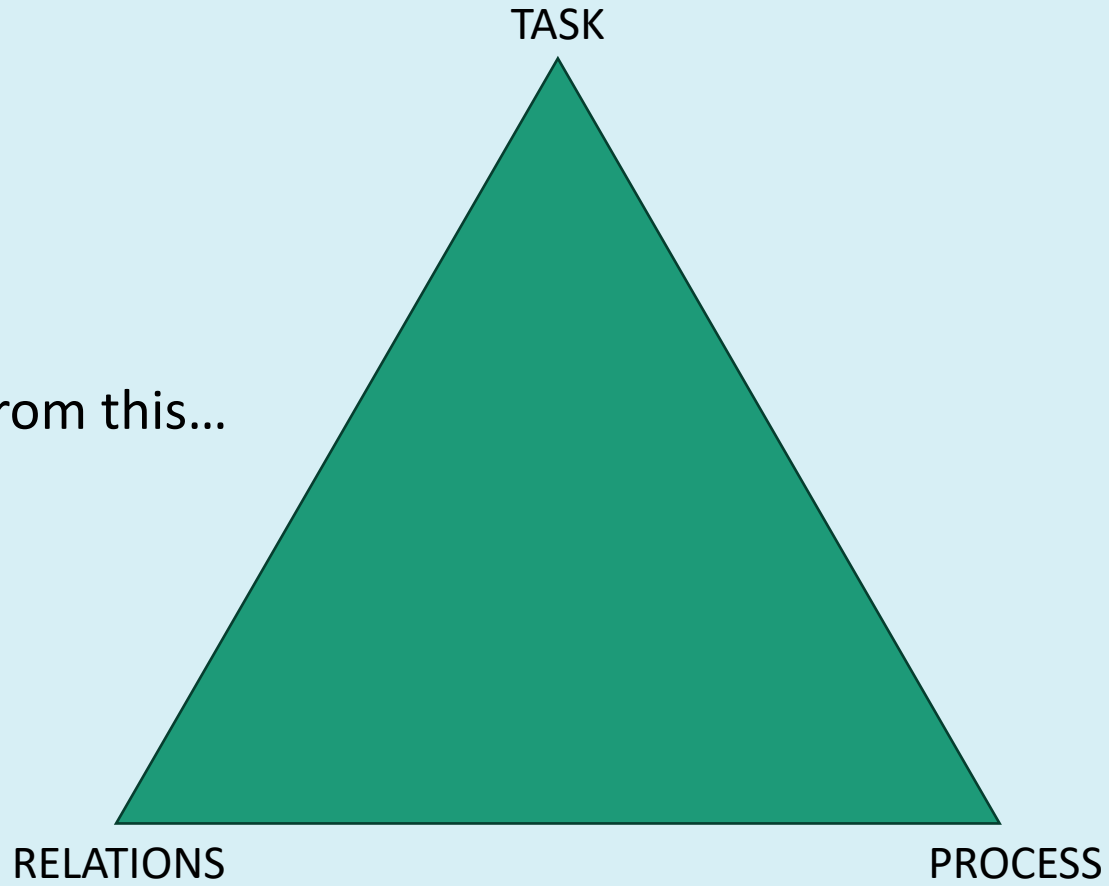
Experiential and Co-productive

- Experiential
 - Facilitation is more an art than a science ->
 - We know good facilitation (tools and techniques) by *experiencing* it.
 - Human beings and the organisations we form are not complicated; they are *complex*
- Co-production
 - Through active listening and dialogue we will *work together* to...
generate ideas about, articulate principles of, and develop strategies for effective participation
 - *A relational approach...*

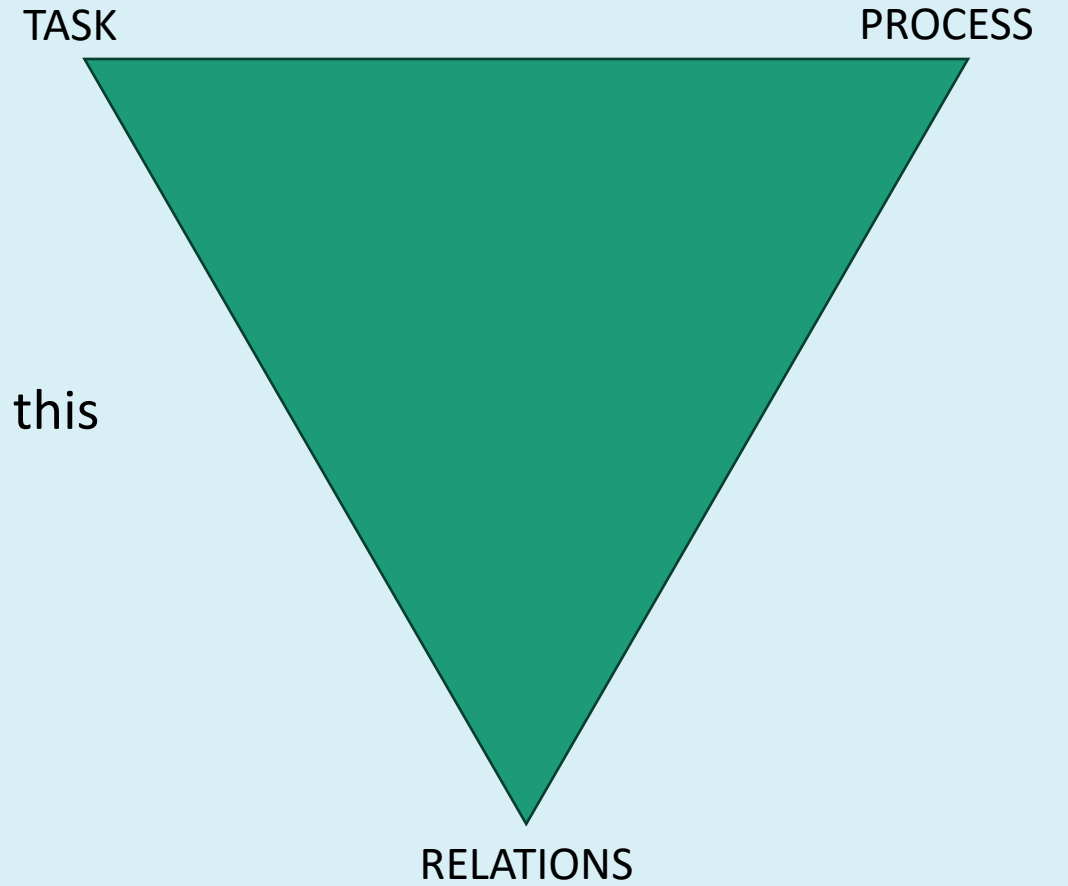


A 'relational' approach

From this...



...to this

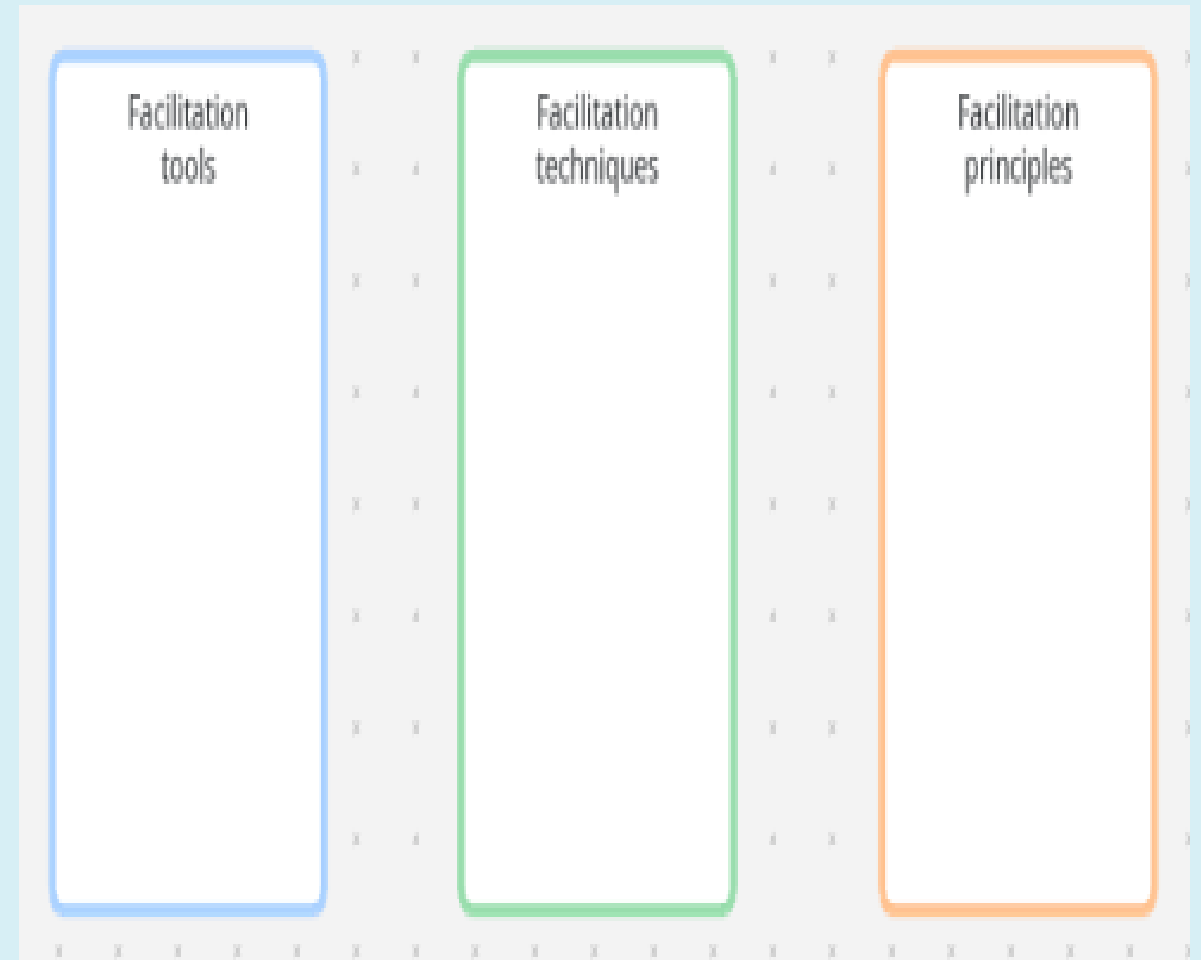


9.

Reflections and plans

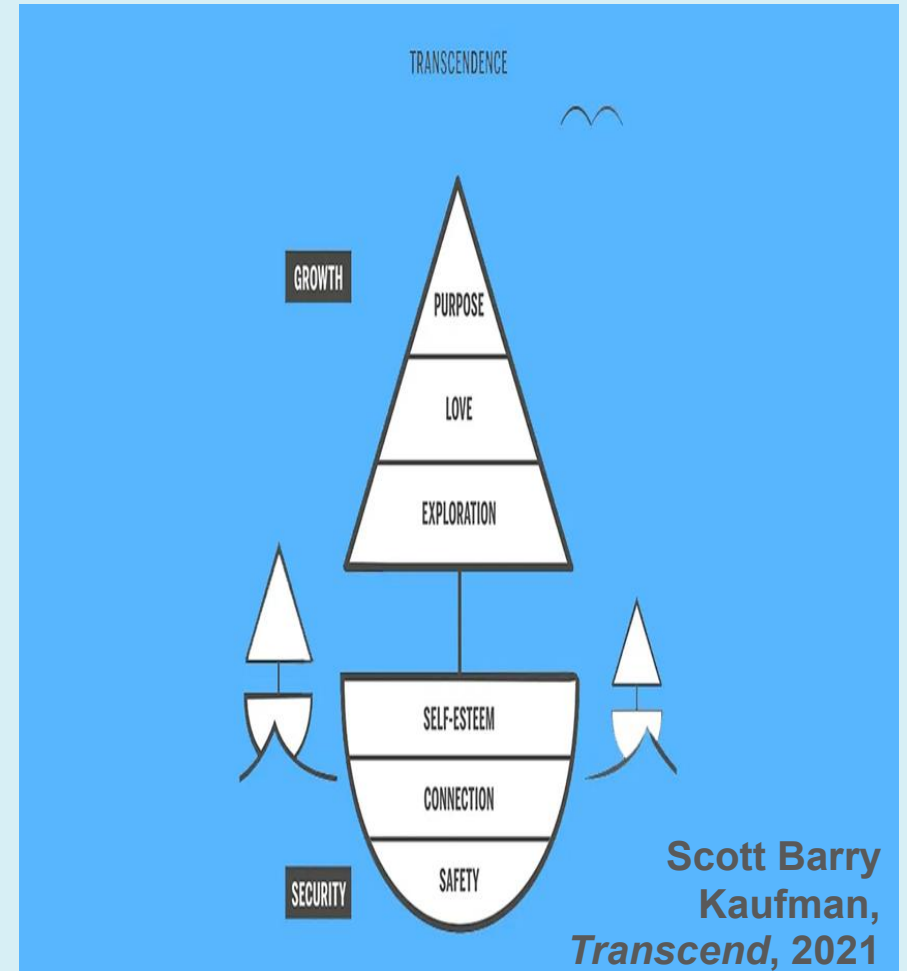
Reviewing our lists

- What's on our list of Tools and Techniques
- Are we clear about what all these are and how/when/where to use them?
- What about our list of Principles?
- I will share these with you all



Reflecting on the day

- Let's remind ourselves of our wants and needs for today's workshop
- Get in pairs for 2 mins each
- Discuss:
 - Did you get what you wanted/needed out of today's workshop?
 - If so, how?
 - If not, how not? Why not?
 - Feel free to use the chat if you prefer



Reflecting on the day

- Final go-round

- How are you feeling about the day?
- What tools and techniques are you looking forward/planning to use?
- What about those principles?



