Facilitation: An Invaluable Skill Set to Achieve Organizations’ Success
Sponsored by the Group on Institutional Planning (GIP)
Today’s Presenters

Sarah E. Peyre, EdD
Executive Director, Institute for Innovative Education
Associate Dean for Innovative Education
Professor of Surgery, Clinical Nursing, Medical Humanities & Bioethics
University of Rochester Medical Center
Macy Faculty Scholar

Katy Stevenson, MPP
Program Administrator, Strategy, Planning and Development
University of Rochester Medical Center
National Chair, Group on Institutional Planning, AAMC
What are you interested in learning today?
Objectives

• Design productive and inspirational meetings.
• Collect group needs and facilitate gatherings to advance the work of groups.
• Construct and deliver innovative facilitated experiences.
• Express leadership presence to drive outcomes in both small and large group settings.
Facilitator’s Key Responsibility

To create a process and an environment to help a group reach a successful decision, solution or conclusion.
• Be clear on the purpose and desired outcome of the meeting
• Do your homework about the group (members, history, expectations)
• Determine any pre-meeting homework
• Know your room set up and IT capabilities
• Have stuff! (post it notes, markers, note pads, tape, timer, food, etc.)
Design an Engaging Meeting

- Learner centered activities
- Opportunities for engagement and connection
- All learners need the core concepts
- Appropriately pace your agenda
- Provide variety to engage even your most timid participant
Know Who is in the Room

- Roles and responsibilities
- History of the team/group – other retreats/meetings they may have done
Heavy lift before the meeting even begins
Create an Inclusive Environment

• Introductions
• Ice breaker/team builder
• Point out comfort – bathrooms, food
• State expectations of inclusion at the beginning – set a verbal contract of respect and active listening to each other
• Think about your materials and how they support an inclusive environment (free from bias)
• Manage participation if needed
Effectively Set Guidelines

- Communicate the road map (where in the process are we?)
- Share your basic assumptions of the group and how they will function
- Solicit input from group on norms/rules
Give Clear Instructions

- Over communicate
- Verbal and written – and reiterate throughout
- Check for understanding
Setting expectations for the group? vs. Creating them within the group?
Be an Active Listener

• Eye contact
• Physically turn, look, draw attention to who is speaking
• Repeat what you hear in a neutral tone – and ask if its correct
Manage Time Like a Referee

- Set expectations on time management – then hold the group to them!
- Give warnings about time coming to an end
- Ask group about flexibility – i.e. we have a 15 minute break scheduled but I think we want more time for discussion. Ok to make it a 5 minute break and start back up at 3:30?
• Monitor content, participation – but also energy levels

• Verbalize observations –
  • “The group seems activated around this topic – this seems to be an emerging priority”
  • “The group energy level seems low – I think we need a break and regroup as to what our priorities are moving forward.”

• Monitor your own energy – the group will often reflect you
Be Flexible

- Good facilitation is about seizing the opportunities that present themselves
  - Understand when a major breakthrough has happened and build on it
  - If there is conflict in the group address it at the moment – if not it will undermind the work that you want to accomplish

- If the group comes up with a good idea that takes you off the agenda – but is aligned with priorities and goals – follow the group!
Agreed Action

• End gathering with high-level summation
• Articulate next steps
• Show gratitude
Neutral Facilitation

• Is there such a thing as a neutral facilitator?
  • Having clear goals is important and its our role to help achieve them
  • **BUT** – sometimes new goals emerge and the group identifies during the group process the “real work” they want to accomplish
  • Servant leader – help them go where they want to go
Questions?
• Be clear on gathering’s purpose and your role.
• Over prepare- it is better than the alternative.
• Know thy audience.
• Have your most senior leader to set the tone.
• Show gratitude and give encouragement frequently.
• Manage unprofessional behavior and move on.
• Understand potential bias.
• Stay energized for the entire meeting.
SAVE THE DATE

Strengthening the Resilience of the Academic Medicine Community
A Symposium Sponsored by the Group on Institutional Planning (GIP), Group on Research Advancement and Development (GRAND) and Group on Business Affairs (GBA)
September 5-6, 2019, AAMC Learning Center, Washington, D.C.

Learn Serve Lead 2019: The AAMC Annual Meeting
November 8-12, 2019, Phoenix, AZ

2020 GBA/GIP Joint Spring Meeting
April 21-24, 2020, Hilton Union Square, San Francisco, CA

For more information on these AAMC events, please visit: www.aamc.org/meetings/ or contact Shawn Rosen-Holtzman at srosenholtzman@aamc.org