

Modified Dynamic Facilitation

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MDF Guidelines

Preparation: If your group decides to use email to prepare and post an agenda before the meeting, a day or two before the meeting, the facilitator will email a reminder to team members with discussion items. Copies to handout will be prepared before the meeting by the facilitator.

New discussion items can be proposed to the group using email before the meeting when possible. (Note: You may want to keep some flexibility and spontaneity and allow people to add to the agenda at the meeting if they have something they are feeling a lot of passion about. It can help keep things more timely and that is important.)

An option is to invite the team to arrive 15 minutes early for tea and socializing. Facilitator to begin meeting at the scheduled start.

Plan for an opening and closing to gracefully bring the group together, and to close the meeting. Members volunteer for this. Other options are quick check-ins and introductions if there are new members or guests.

Options: Read the Vision/Mission of the group. Review meeting facilitation agreements. Ask for volunteer timekeeper if needed. Prioritize and timeline discussion items if desired. (Be careful to schedule an amount you can actually address, not trying to be comprehensive or you can end up rushing to cover everything, which is not so much fun.) Review agenda from previous meeting's minutes (a few minutes)

At business meeting start, facilitator can (or a member can volunteer to): review agenda with team regarding item prioritization, time frames and write them on a large newsprint tablet page that can be seen by everyone. This page has the agenda items, abbreviated, and columns below for brief notes on Decisions, Homework, Ahas!, Concerns and Next Meeting Agenda - or whatever of these your group needs.

This is handy to have on a large newsprint tablet for the next meeting. (Note: This turns out to be very helpful! Everything is right there. All your meetings are archived and can be referenced easily right there.)

Option: Timekeeper signals to remind the group in an unobtrusive way. (For example, hold up fingers to indicate number of minutes remaining.) Modifications to the time limit can be decided upon, if needed.

Sub-team reports:

Facilitator will help keep reports around 5 minutes maybe 10, uninterrupted
Group allows reporter to give a complete report--leaving questions for the end.

Facilitator will make spaces at the bottom of the newsprint chart for:

Decisions

Homework -(volunteered individual tasks)

Aha's (!) -very helpful when they happen, can take group to new level

Concerns - tend to resolve naturally when they are written on the newsprint chart in full view during the meeting. - This is a big advantage of this MDF process. -L

Next meeting's agenda items- Can be kept on the next page if not enough room.

This may seem like a lot to record but we were able to do it and got better at it and it proved to be very helpful in the long run.

Consensus is the goal for agenda topics.

We may decide to use the finger voting method:

1 finger held up: I agree.

2 fingers: I don't agree but I'm willing to live with it.

3 fingers: I don't agree but I'm willing to work for an alternative solution.

At the end of each meeting, designate the facilitator and notetaker and agree upon a time for the next meeting, if you haven't a regular schedule for them

Minutes can be typed up in Micro\$oft Word format by notetaker for reading and scanning ease. Next meeting agenda, time, and homework will be at end of notes.

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Notes for organizing meetings (including Conference Calls) using Acorn/Holacracy

by Lynnette Allen

I've added elements from Holacracy to the Acorn Model as they seem to complement each other. I also reference principles from the recently published The Transition Handbook by Rob Hopkins, as they clarify what I've experienced. The Transition Handbook has excellent organizing processes and tips.

Here are some points I like to include in organizing meetings. (I recommend using more usual titles of functions, like coordinator, note taker, etc., instead of names of directions if this seems confusing to some.)

Start the meeting on time. Everyone is encouraged to be on time so we don't have to fill latecomers in on what has already happened. Everyone is encouraged to bring their personal calendars and a notebook.

North – The selected coordinator keeps the perspective of the group's mission and reminds the group of this when needed. This fulfills the need for wisdom coordination. (Option: North can often do the functions of the East like welcoming, introductions and check-in and also the motivating words of the SE.)

North East – Plans the opening and closing with some words that honor and acknowledge the spirit of the group. Optional – NE can also take the function of North's liaison, watching the energy level of the group and of the participants, and bringing any downswings to the attention of the North if needed. This is a supportive role, a troubleshooting role, and can be very helpful to the flow of the session.

East – Welcomes everyone. Introductions if necessary. Can conduct a short check-in that acknowledges member's personal desires for input. Can give a motivating introduction to doing the work of the session. (South East)

South – Doing the work – This can be facilitated by the North (Coordinator) or a member can volunteer to facilitate, maintaining a neutral position. There can be a pre-agreed upon agenda which can be modified. I prefer the Holacracy way, which is to create the agenda at the meeting. I find this more egalitarian. Decisions are made to be workable, not for perfection as every decision can be revisited.* See Holacracy Intro.) A Secretary or a member takes notes of the decisions made and the commitments made at the session. These are sent out to all the members. It's easiest to type these on a laptop so that they can be quickly saved and then distributed by email. The next meeting date, time and place are details to be sure to include. If there are any changes in the members who will function in the main roles—Facilitator, Note taker, etc. for the next meeting, they are also decided and noted.

South West – Is there a need for a break, rest, refreshment?

West –Harvest – a review of what we achieved: Aha's? What were our decisions and commitments? Who will do what? What was completed? Feedback, how the facilitation was for you? What needs were met for the group?

North West – Appreciations, celebrations. What did we learn? How does this take us another step up the spiral of achieving our mission?

References

· The Acorn / 8-Shields Model from the Wilderness Awareness School

www.lynnallen.net/Acorn.html

· Holacracy guidelines and principles - see attached HolacracyIntro2007-06.pdf - I was especially looking at Roles and Accountabilities, the section on Organizational Control, pp 14-20 and the 3rd paragraph under Requisite Organization.

· Principles and guidelines from The Transition Handbook by Rob Hopkins

For more on the Acorn model, see <http://www.lynnallen.net/Acorn.html>