

MANAGING FACILITATED PROCESSES

by Dorothy Strachan and Marian Pitters, Book, 2009, Jossey-Bass Inc.

Review by Lee Smedley

Rating: ★★☆☆

- *Addresses the details of facilitated events*
- *Packed with practical tools*

Big picture, detail-challenged facilitators rejoice! [Managing Facilitated Processes](#) helps you manage the details of a facilitation engagement from beginning to end.

Even though you may be great in front of a group, you may also have lost clients because you stumbled onto an organizational culture landmine. Perhaps support staff drives you crazy with requests for room specifications and supplies checklists, sponsors want drafts of notification memos, and participants want details about breaks and menus. Canadian co-authors Dorothy Strachan and Marian Pitters bring their considerable experience to your rescue.

DESCRIPTION

Written for consultants, trainers, event planners, and educators in addition to facilitators, the 174-page text emphasizes the need to align virtually every aspect of a facilitation engagement around its stated goals. Each of the ten chapters contains charts, sample checklists, and documents (25 modifiable templates also available on the web), anecdotes from the authors' own experience, and specific advice on the various elements of an engagement:

1. Initial Contact
2. Building Agreements that Work
3. Approach
4. Style
5. Participants
6. Speakers
7. Logistics
8. Documents
9. Feedback
10. Endings and Beginnings

The book contains a Table of Contents and References List but no index.

EVALUATION

This is not a text on how to facilitate, even though it contains some valuable tips for that. Rather, the authors describe it as a "practical desktop tool," a process handbook ensuring that competent facilitators and their support team will achieve the goals of a facilitation event.

The depth and breadth of coverage is impressive. Interested in the advantages and disadvantages of various kinds of facilitation? It's in there. How about cultural and physical inclusion, room layout suggestions, sample contract language, suggestions for working with guest speakers, or how to say no tactfully? They're in there too.

The format is easy to navigate. It uses tabs synched to the table of contents, cartoon drawings, and on-the-web icons to help you find what you need in a hurry.

A text on this subject could drag on as an endless list of "don't forget" reminders and checklists. But, these authors offer more reflective segments that enliven almost every chapter and offer other equally valuable insights. Notable are:

- Ethnocultural considerations
- A comprehensive framework for designing integrated, customized and systematic events
- Strengths and weaknesses of various facilitator styles. You'll chuckle at the descriptions of Loosey-Goosey Lucy, Bureaucratic Bill, and others.
- Site health, safety and security considerations

Facilitator self-care, especially the information on travel arrangements and personal amenities

There are a few nuisances:

- No Index: Table of Contents notwithstanding, I still want alphabetical listings for speedy access and page numbers for completeness when a topic appears more than once in a text.
- Confusing Canadian English: It took some digging to find out what a cock-up is (Chapter 2). You'll have to do your own research on that colloquialism.
- No Spokes Setup: Chip Bell, one of my favorite consultants, recommended the semi-circle spokes-of-a-wheel table setup that I have used for years. It supports both at-table discussion and eyes front attention for the facilitator,

and is missing from the otherwise amazingly complete set of seating arrangements in Chapter 7.

Recommendation

Buy it and scribble all over it! *Managing Facilitated Processes* is a must-have for facilitators, especially those just starting out in business for themselves, and for those supporting or managing facilitators. It will not only help you avoid cultural landmines; it will also save you time and money.