Remote Facilitation

CMS CENTERS FOR MEDICARE & MEDICAID SERVICES

Why?

Reality of Environment

OIT operates in a remote world. This presents unique challenges when it comes to facilitation. However, there are many tools and techniques to help ensure your facilitation runs smoothly.

Virtual Challenges

- Tech can be unpredictable
- Participants engage differently
- Less feedback from participants
- Conversation flow is slower
- Difficult to develop group cohesion

Who?

Carefully consider who will be invited to the meeting and clarify their role during the meeting.

- Facilitator
- Co-Facilitator
- Sponsor/Stakeholder
- Time Keeper
- Scribe
- Participant
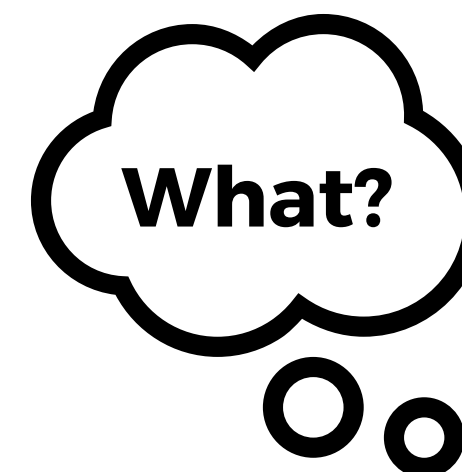
What?

Session Feasibility

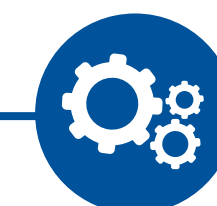Determine Need
Participants
Level of Commitment
Risks

Things Groups Do Well
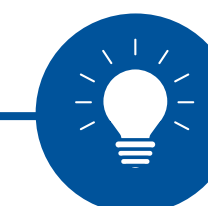
Gather Ideas
Validate
Prioritize
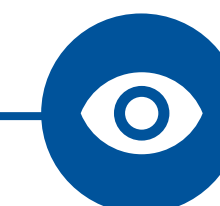Make Decisions

Create a Detailed Agenda

Time → Process → Techniques → Visuals

How?

Tools & Techniques

For detailed information on these, check out the Facilitation Tools Library document.

Pair & Share   Comfort   Kudos   Prioritization   Timeboxing   Pass Mic
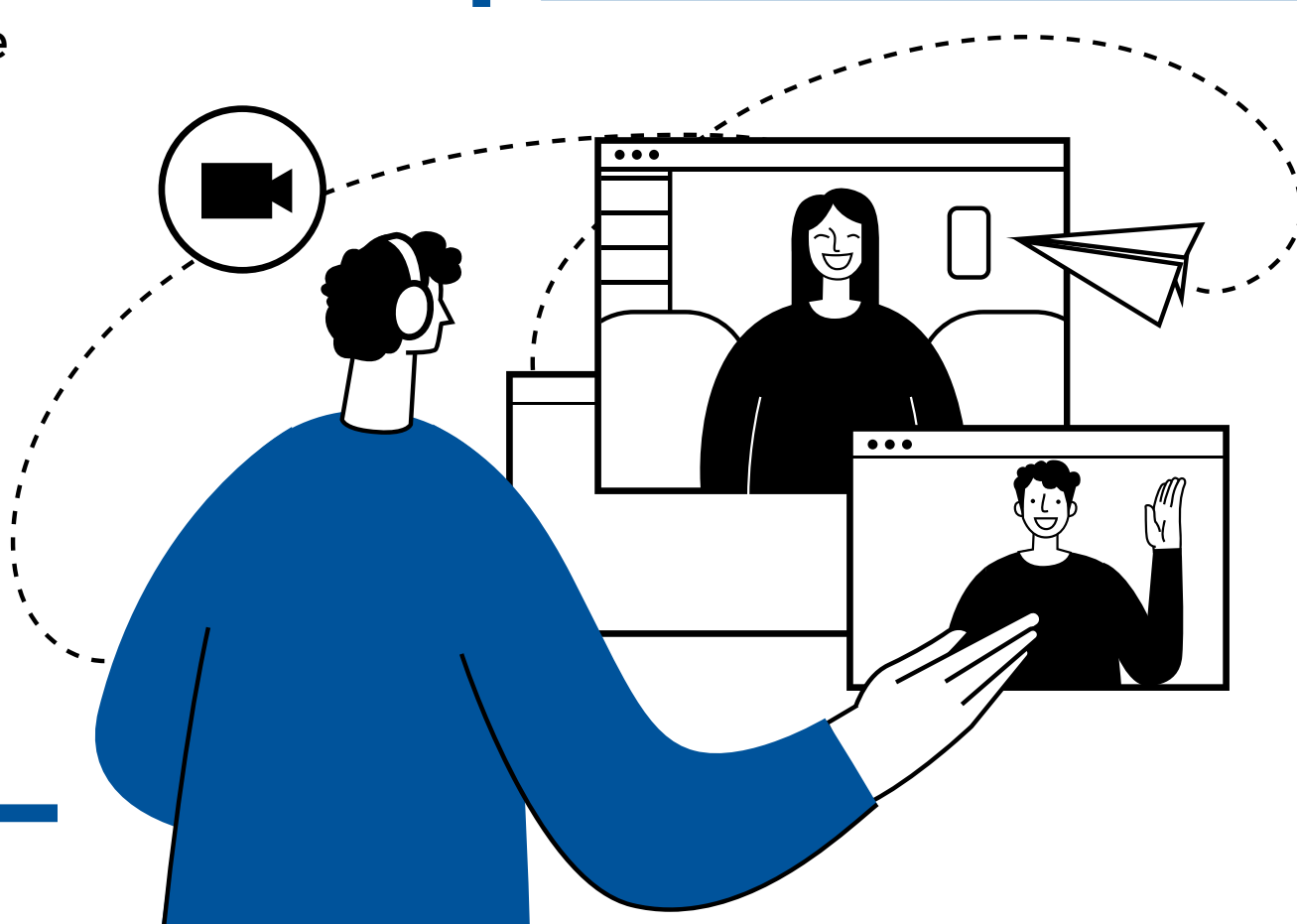
Heartbeat Retro   Delegation Poker   Peer Learning   Next Steps   Social Contract   Energy Gauge

Remote Facilitation

CHALLENGE	TIPS
Tech can be unpredictable	- Practice with tech you have never used before. - Always have a backup tech solution ready if your original tech fails. - Plan for breaks every 45-60 minutes. This gives your participants a needed break and gives you time to resolve tech issues.
Participants engage differently	- If participants are unfamiliar with the tech, plan for orientation time. - Be aware of comfort levels of participants with working online and provide extra help (or co-facilitator) if needed. - When in groups of 12 or less, suggest all participants keep microphones unmuted so they hear each other's reactions (as if they were in the same room.) - If typically running in-person sessions that are day-long or multi-day, consider using half days and providing gap days in between for applying knowledge gained in each session.
Less feedback from participants	- Consider different ways of providing feedback using nonverbal communication such as hand signals, emojis, and icon reactions in Zoom. - Make feedback fun (gamify.)
Conversation flow is slower	- Let participants signal and manage who speaks next (call on next person; pass a virtual ball or talking stick). - Audibly repeat what is read in chat (don't ignore chat.)
Difficult to develop group cohesion	- Use connective icebreakers that share a little about the person (e.g., what's one song you could listen to on repeat? What television show do you consider a guilty pleasure? Find and paste an avatar you would like to represent you in this session.) - When splitting up into groups for longer sessions, let the groups develop an identity (group name, logo.) - Let groups self-organize in the virtual space based on topics they are passionate about and use techniques that provide sufficient structure (lean coffee, open space, world cafe.)