

CO-FACILITATION: THE ART OF PARTNERING AND COLLABORATION

Whether you are running a corporate or public program, you may be called on, or be inclined, to co-facilitate a program. In this additional commentary to *Effective Group Coaching*, I will offer core tips for developing a successful co-facilitation experience, including core questions and tasks for co-facilitators to consider before, during, and after running a program together.

CO-FACILITATION: WHAT IS IT?

When was the last time you experienced a productive and enjoyable co-facilitation? I really believe that great co-facilitation is an art form. And the good news is, there are things we can do to create an environment of success when we are co-leading.

Co-facilitation enhances the possibilities and outcomes of group programs, ensuring that the facilitation experience comes from a place where the “sum is greater than it’s parts.”

Over the last twenty-plus years, I’ve worn a number of co-facilitation hats. For many years, I co-facilitated organization-wide retreat programs for groups of 200 or more. As a relationship systems coach, most of my large group work is done through co-facilitation when working with teams. In recent years, I have also co-designed and co-facilitated a number of virtual and in-person programs with other coaches and trainers, such as the Get Organized Virtual Retreat with professional organizer Hellen Buttigieg.

But, what exactly is co-facilitation? In their book, *Co-Facilitation*, Joanna Knight and Warren Scott write:

The distinguishing feature of co-facilitation is that it is intended to be a partnership, where two or more facilitators take joint responsibility for filling the facilitator role. The purpose of this partnership is either to enable and maximize group and individual learning, or to help the group to achieve other ends such as making a business decision.

—Knight and Scott (1997, p.10)

The following commentary focuses on co-facilitation—the practicalities and also the art of making co-leading really work. Co-leading and co-teaching may be other terms used, but here I will be referring to them as co-facilitation.

Take a minute to consider: What has been your experience with co-facilitation? What's worked and what hasn't?

Co-facilitation can be a natural progression for work with groups. With numbers being larger, co-facilitation can make this work easier. I will provide you with insights into the pluses and pitfalls of co-facilitation, and in addition, a number of core questions and tips to consider with your co-facilitator when you are designing, running, and debriefing your next project together.

THE PLUSES AND MINUSES OF CO-FACILITATION

Is co-facilitation always essential? No. But co-facilitation brings a number of benefits, especially if:

- your group size is large
- you want to be able to provide alternative perspectives and voices as facilitators
- you want to ensure that the facilitation team brings a mix of expertise (perhaps industry experience and/or subject matter experience in addition to facilitation experience)
- you want to provide a variety of styles/approaches.

Creating a strong partnership as co-facilitators can mean the difference between an ordinary and an exceptional program. Participants have the unique ability to pick up even subtle nuances or tensions between co-facilitators.

The Pluses of Co-Facilitation

Some of the pluses of co-facilitation are:

- When working with a larger group, it really can lighten the load. There is a huge list of things that need to get done, including preparation, design, holding the space for the group, observing what is going on from a process standpoint, and dealing with logistical issues;
- Throughout the design process, different skills and different perspectives can allow for a more robust approach;
- It allows participants to experience different perspectives, styles, energies, approaches, and questions;
- It can provide a model of co-leadership for participants;
- Enhanced creativity; and
- It can provide complimentary synergy.

Take a moment to list other benefits you see in co-facilitation.

The Pitfalls of Co-Facilitation

When co-facilitation doesn't work, it can be a disaster. The stakes are higher with co-facilitation than other partnerships, because those impacted are not just you and your co-facilitation partner, but also the group you are working with.

Great co-facilitation typically does not just happen. There is need for some prep work and time investment up front. Major stumbling blocks can include:

- ego(s) getting in the way
- adopting competitive rather than collaborative approaches
- both partners not leaning into the relationship equally
- a mis-match of styles.

With groups where a co-facilitation approach is not common, the group may feel that they are difficult to manage, or may perceive that one of the facilitators is weaker than the other and cannot facilitate by themselves. What other pitfalls to co-facilitation might exist?

Setting the Stage for Awesome Co-Facilitation

As previously mentioned, great co-facilitation does not just happen—some prep work and planning is involved. From project management best practices, we know that some of the most successful projects occur when attention is paid to the planning stage.

To set the stage for success, prior to your co-facilitation, schedule time to meet with your co-facilitator in person or virtually for a design meeting—not a design of the program, but a design of how you want to work together.

Here are a couple of things to keep in mind when designing your next co-facilitation. At an initial level consider:

1. **What are your strengths? Your passions? Your weaknesses?** Creating the opportunity for each person to leverage their strengths and passions leads to more fun, creativity, and presence. What are you good at? What do you like to do?

Ask yourselves: Individually, what are our strengths? Together, what are our strengths? What are our blind-spots?

2. **How are you complementary?** Many successful partnerships in the business world are based on complementary skills—how do you each complement each other? I have seen excellent facilitators come together to co-facilitate, but the program has fallen flat, in part due to the similar nature, styles, and preferences of each one. If you are working with someone who is very much like yourself, what do you need to be aware of? What gaps exist? How can you bring in the complimentary skills you need?

Ask yourselves:

- Where do our skills complement each other? Where do our skills match?
 - Where do our personalities complement each other? Where are they the same?
 - Where are the gaps? What other skills do we need for a successful program?
3. **Clearly define your roles.** Masterful co-facilitation is like a dance. Who is taking the lead? Things get murky when roles are not clear. I spend a lot of time up-front with my co-facilitator, even before the start of a program, designing what our roles are going to be. Who will take a lead on this part of the program? Who is going to be responsible for that? Spending time

to build this foundation allows us to look at where we synergize and who takes the lead at different stages.

4. What are your expectations for the program and your partnership?

Spend time before the program discussing your expectations for the program and your partnership. A disconnect between each party's expectations can lead to conflict and a sour taste in your mouth.

Ask each other: What are your hopes, fears, and fantasies for the program and the partnership?

Some additional practical questions to ask (individually and together) when you are starting a new co-facilitation:

About ourselves as a partnership:

- Who are we as individuals? As a pair? As a co-facilitation team?
- What are our values as individuals? What are our values as a team?
- What are our goals for a partnership? What do we hope to accomplish?
- What unique skills, abilities or characteristics do we bring to the partnership?
- What are you looking for in a partner—to enhance your weaker areas, to expand you into new markets?
- What particular skills are you looking for in a partner?
- What particular characteristics are you looking for in a partner?
- What are our expectations from the partnership?

About the program itself:

- What do we want to model in our work together for the group?
- What are the “must-haves” for our work together?
- What's the stake we have in this work?
- How will we measure success?

Creating conscious, intentional relationships can mean the difference between ordinary and exceptional. Participants also have a unique ability to pick up even subtle nuances or tensions between co-facilitators.

Creating Your Own Unique Program Environment

Just as you create your own unique environment as a group coach, you and your co-facilitator will also create a unique vision and feel for each program you design and/or deliver together.

You will want to consider questions along these lines:

- What is the atmosphere we want to create?
- To create safety and trust in our group we will _____?
- What is our stake for this program—what are we committed to creating together?
- How and when will we check in with one another?
- What is our shared vision for this program?
- What is our philosophy as a co-facilitation team?
- What is my stake as an individual? What is our stake as a team?
- What can we do to keep on target?
- What will we do if we get off target?
- What will I be responsible for?

Looking at Your Styles

Co-facilitation of programs provides a wonderful opportunity for participants to view and experience a positive collaborative partnership. It also provides a richer experience for the learners who can benefit from two different personalities, sets of life experiences, communication styles, and facilitation styles.

Spend time discussing your unique styles, how they match, where gaps exist, and what changes you may want, or need, to make.

EXERCISE: SWOT

As a co-facilitation team, complete a SWOT exercise for your partnership. The SWOT has traditionally been a strategic planning tool and is a wonderful tool for business owners as well as co-facilitators.

As a partnership, ask yourselves and note the strengths and weaknesses of your co-facilitation experience, as well as the external opportunities and threats facing your partnership. As you consider your strengths and opportunities, ask yourselves, what can we do to leverage these in our work? As you consider weaknesses and threats, ask yourselves what do you want to put in place to address these?

SWOT — Strengths, Weaknesses, Opportunities, and Threats

<p>Strengths</p> <p>What are our greatest assets, gifts, and strengths?</p>	<p>Weaknesses</p> <p>What weaknesses do we have that need to be addressed?</p>
<p>Opportunities</p> <p>What resources, people, or situations can help us move forward?</p>	<p>Threats/Obstacles</p> <p>What situations, if left unattended, would derail our plans?</p>

PRACTICAL QUESTIONS TO ASK BEFORE YOU ARE IN THE ROOM

In addition to creating a solid foundation, it is important to address the practicalities of how you are going to work together. Before your first session with your group, consider the following:

1. Who will take a lead on each section?
2. What roles and responsibilities will you each of you have along the way?
3. Make a list of all the things that need to happen—i.e., developing the evaluation form, marketing materials, etc.
4. What will you do while the other is facilitating in the front of the room?
5. How will you deal with differences that arise in front of the group?
6. How will you check your ego at the door?
7. What changes will you make to elongate the program as needed (accordion out)?
8. What changes will you make to shorten the program as needed (accordion in)?
9. Discuss how you would like to be supported by your partner. Remember that one person's idea of support is not the same as another person's.
10. How will we make the changes mid-stream during the program?
11. What are the “must-haves?” (Must-haves are those topics that really have to be included in the program.)
12. What will each one of you do to spread the word about the program—to market it?

MAKING IT FLOW: THINGS TO DO DURING THE SESSION

To facilitate the flow of a program, you will want to:

- **Check, plan, dance.** Check in with each other consistently throughout the program. Plan as you go. Dance and change your rhythm together as needed, in service to your group.
- **Remember your game plan—accordion style.** Which sections are your must-haves? Nice-to-haves? Which exercises/topics can be expanded if

time is available? Which exercises/topics need to be shortened if time is running out?

- **Acknowledge each other.** Provide feedback and acknowledgment to each other throughout the program. Build in pauses to connect as a partnership.
- **Support each other in meaningful ways.** Consider how you want support and remember how they want support.
- **Leave space for your co-facilitator to add powerful questions and/or comments.** Groups really do benefit from the alternative style another facilitator brings. Look at how you will work in terms of asking questions and facilitating exercises.
- **Don't hesitate to intrude!** In a value-added way, there may be times when your voice and perspectives as a co-facilitator can be very useful. Use your skill of intrusion.
- **Use “we” and “our” rather than “I” and “my”.** Co-facilitation can be a powerful learning experience for participants in seeing how co-leadership really works. Demonstrate this even through collaborative language.

POST-SESSION FOLLOW-UP

It is important to schedule a debrief, or review, of the program as close to the event as possible. Talk about:

- What worked well?
- What didn't work well?
- What the biggest learning was—individually and as a partnership.
- What changes do you want to make for next time?
- Be specific with feedback and examples.
- Divide up follow-up activities—i.e., summarizing evaluation, reaching back to the client(s), posting material, etc.

Take note of issues that have emerged, and write down what changes you will make for next time. It is interesting how the lessons learned are difficult to remember for the next time if they are not written down.

Roles and Tasks for Co-Facilitation Teams

Logistically, there are a number of tasks which need to be completed over the course of a program. Consider who will be responsible for completion of the following:

Roles and Tasks During a Session:

- Flip charts/posting materials
- Setting up new exercises
- Probing using questions
- Timekeeper
- Facilitating
- Managing logistics—i.e., meals, temperature within room, participants who arrive late

Pre-Session Roles and Tasks:

Who will be in charge of logistics? This may include arranging the venue, discussing seating arrangements and materials needed for the session, as well as snack and meal requirements. Also consider the following tasks:

- Liaising with client(s)
- Responsibility for evaluation forms, creating booklets.
- Who is bringing what material?
- Designing different exercises/modules.

Post-Session Roles and Tasks:

There are a number of tasks which may need to be completed at the end of a session, including:

- Follow-up with clients post meetings
- Emails re: course follow-up
- Material distribution
- Posting materials online
- Thank-yous with group/venue/other
- Summary of evaluation, and
- Summary of materials produced.

As a best practice, divide these up with your co-facilitator.



In the Spotlight: Jennifer Britton, PCC and Sharon Miller, PCC

Over the past few years, I have been privileged to undertake some high impact co-facilitation work with Sharon Miller, PCC of CoachingWorks. In fact, many of the questions I've included throughout this chapter are ones that we have used ourselves in designing and re-designing our work together.

Sharon and I found ourselves sitting beside each other at an advanced coach training program several years ago. As we introduced ourselves we found that we had several passions in common, including the beautiful northern land of Muskoka. As we spoke further, we realized our passion for doing great, and easy, work with clients.

Over the past two plus years, Sharon and I have gone on to co-design and co-facilitate a number of very powerful corporate and public programs including:

- Relationships On Fire™ couples retreats in Muskoka;
- Customized team retreats and team coaching processes using the Team Diagnostic Assessment™; and
- Teams On Fire™ and Customized Retreats, and team coaching, for teams.

Part of our vision is to continue to take our team coaching work further into the Muskoka context, providing teams with the opportunity to connect, as well as rejuvenate, in the wilderness area.

In the true collaborative spirit of our partnership, I reached out to Sharon to get her insights about what makes our work so powerful.

In her own voice, here is what Sharon has added:

We consciously design not only what we will do, but how we will be with each other. We are intentional about doing things that will make us happy and fulfilled. We are unafraid to make requests of each other. We are NCRW (naturally creative, resourceful and whole) and NRFE (not responsible for everything).

We create systems on how we will work with clients. We invest a fair bit of time up front designing something great and then cut and paste thereafter with subsequent clients.

We are open to change in the moment. We will throw out our design in service of the client and where they are at and what they want.

We set a strong context with our clients so neither they nor we are making assumptions that get us all offtrack or confused. We keep checking in.

Speaking of learning, we are constantly doing that.

Lessons Learned

Two of the major lessons I have learned from working with Sharon are the following:

1. Regular attention and checking-in with our partnership keeps things fresh and easy.
2. Remember the power of **We**. Sharon and I continue to get complimented on the seamless dance we provide to clients. Our ability to model co-leadership is also another very important component for groups we work with.

As we have explored in this chapter, co-facilitation can add a new layer on to your group coaching experience, for both you, and your clients. It is as much an art, as it is a science. As you take your work and learning forward as a co-facilitator, take note of the best practices you are evolving, and how your work together demonstrates the old adage that “one plus one is greater than two”.

CHAPTER REVIEW

- What are your thoughts about co-facilitation?
- Who might be possible partners?
- What is your next step with respect to co-facilitation?