



# Tom Romito

## FACILITATOR

### FACILITATION AND ACTION PLANNING

I'm Tom Romito. I'm a facilitator and I work with organizations that want to improve themselves. This short paper explains how I, as a facilitator, help them do that through a process called action planning.

When I meet with a group for the first time, I ask them what they want to accomplish. Usually, they don't know exactly what they want to do. They all maintain, however, that their efforts are fragmented and unfocused because they don't have any money, their boards and officers are burned out, and they don't have a plan for the future. I explain that I can offer three ways to help them. They are action planning, strategic planning, and team building. All three have the objective of improving internal management, but they differ in their approach and intensity. I decide on the right approach to use based on my assessment of the group's health, size, and interest.

If the organization I'm going to work with is a start-up, I know right away that it's ripe for a strategic planning process. If the organization that has been in existence for a while and is high-performing, however, they may need something less intensive and time-consuming. What they usually want is a way to tightly focus their efforts for the next year or so in about two hours. A useful approach that I've developed to help them do this is action planning. Here are the steps I use to help them develop an action plan:

- **Develop an agenda.** When I step of the group with my four flip charts behind me, I tell the group that I don't have an agenda. I tell them they do, it's in their heads, and my job is to pull it out of them and give it shape. Then I ask them, "So, why are we here?" I have them give me their top of mind reasons for coming together, and we come up with a prioritized list of five to ten objectives they want to address.
- **Flesh out each agenda item.** One by one, we examine the agenda items and I capture the most relevant content on my flip charts, using different colored markers to easily distinguish the different points. Almost immediately, actions begin to emerge.
- **Create an action plan.** As actions emerge, I transfer them to an action plan template that I draw on one of the flip charts. The template shows the What, Who, and When for each action. The What crystallizes exactly what the group wants to do. The Who and When establish

accountability for accomplishing each action. At this point, the facilitated workshop is over and the group can conduct any business or tie up loose ends before we adjourn.

- **Disseminate the action plan.** Although the meeting is over, my job is not done. I take the flip chart sheets home and produce the action plan on an 8 ½ X 11-inch document. Then I e-mail it to the group or organizational leader for further dissemination to the other members.

When guided by a skilled facilitator, a high-performing group can create an action plan for the next year in two hours. They often marvel that I got them to agree on anything! Some groups I have helped like this don't have to meet again for another year. Then we repeat the process.