



Facilitating Awesome Events with Open Leadership in Mind

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Welcome everyone to the call and thank them for their participation and help sharing ideas for facilitating awesome events.



Part 1

This part of the training should take 30- 40 minutes.

Agenda

Part 1

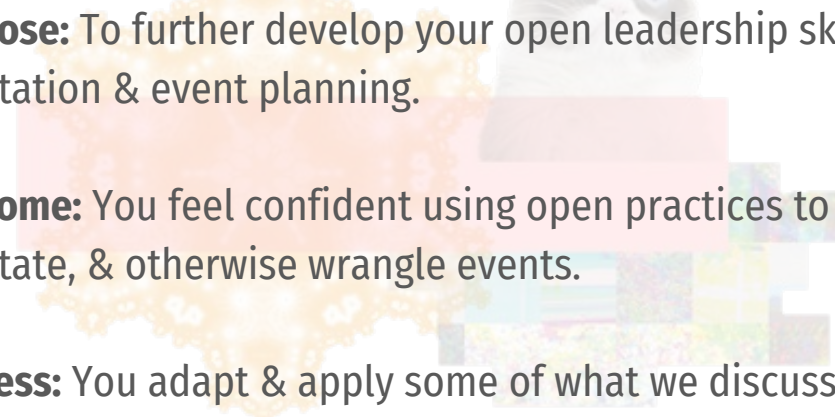
1. POP
2. An event is like a project.
3. Feelings matter.
4. Delegate (& work on a weakness).

Part 2

1. Make meaning before practicing skills.
2. Always have a backup plan.
3. Design for feedback.
4. Follow up.

< 1 minute

POP

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- **Purpose:** To further develop your open leadership skills in facilitation & event planning.
 - **Outcome:** You feel confident using open practices to help plan, facilitate, & otherwise wrangle events.
 - **Process:** You adapt & apply some of what we discuss today as part of your next event.

2-3 minutes.

This is our POP for this call. A POP helps ensure that a meeting (or other piece of work) is useful and meaningful for all attendees. We recommend writing and sharing a POP for meetings you schedule.

POP stands for purpose, outcomes, and process. You can use a POP to help plan every event - or even every project or meeting.

Your purpose should be your vision or goal.

Your outcome should be the change you want to see by achieving your goal.

Your process should be the steps you will take to make your outcomes happen.

You can POP big things or little things; personal things or professional things; it's a tool to help you align your work with your vision for it and desired results. For example, you could use a POP and some storytelling in the vision document of an event or project you're planning and facilitating.

Questions?

A Grumpy Cat is centered in the background. Overlaid on the left is a large, intricate, golden-yellow mandala-like pattern. Overlaid on the right is a colorful, pixelated graphic. A semi-transparent pink rectangular box is positioned behind the main title text.

1. An event is like a project.

10 minutes

1. Get organized
 - a. Vision/POP
 - i. Tell your story in a succinct and compelling way.
 - b. Roadmap & milestones
 - i. Outline your plan and help community members hold you accountable for meeting hard deadlines, especially for sharing information and content.
 - ii. It's fine to have a mix of hard and soft deadlines, like, "April 30th, 2018," and "Summer, 2018," respectively.
 - iii. Along the way, be transparent about any milestones you know you will fail to meet and share your plan for catching up later. It's not the mis-steps that harm trust in a community, it's a refusal to acknowledge or deal with them transparently and responsibly that hurts engagement.
2. Execute
 - a. Research your audience's (or personas') needs.
 - i. You can use before-during-after personas to add storytelling to your project.
 1. Before: who is this person? How did they find your project? Why do they want to contribute?
 2. What do they do during your project? What do they learn? How do they feel?
 3. After your project, and as a result, what do they bring back to their own work or community? How do they stay engaged with your

1. project?

Example:

<https://github.com/mozilla/open-leadership-framework/blob/master/personas.md>

- b. Track “issues” or tasks.
 - i. Be sure to create any helpful, custom labels your project needs for issues filed in GitHub.
- c. Share early and often and afterwards.
 - i. Share information and content across multiple channels that are used by your contributors and users (e.g. blogs, Twitter, FB groups, Gitter, etc.)
 - ii. Communicate even when there’s not much to share - and just say that - to establish and maintain a trusted cadence of communication.

2. Q&A/discussion

- a. How are event and project planning similar to and different from one another?
- b. What are some of the best examples of storytelling you’ve seen in event or project planning and facilitation? What did that storytelling accomplish?
- c. What are your pro tips for event and project planning?



2. Feelings matter.

10 minutes

1. How an experience feels is as important as the content in it.
 - a. Information isn't everything (even for adults).
 - b. Design for fun, as well as meaning.
 - c. Ask for any mentorship you need in teaching.
 - d. Think of how you would want to feel after your event.
2. Q&A/discussion
 - a. How does your engagement change when you feel engaged and fulfilled by an event or project? When you feel disengaged or negatively about it?
 - b. What are the differentiators between events and projects that give people positive feelings and those that give them negative feelings?
 - c. What are your protips for reading a community and working to meet its emotional needs for engagement?

A Grumpy Cat is positioned behind a semi-transparent pink rectangular banner. To the left of the cat is a large, intricate, golden-yellow mandala-like decorative pattern. To the right of the cat is a colorful, pixelated graphic consisting of various small squares in shades of blue, green, yellow, and purple.

3. Delegate (& work on a weakness).

10 minutes.

1. Delegate to people's strengths.
 - a. Plan and facilitate with your weaknesses, as well as strengths, in mind.
 - b. Delegation is a great opportunity to include contributors in planning & executing an event.
 - c. Cover your blind-spots (e.g. logistics or pedagogy) by promoting contributors to leadership positions that are best-fit matches for them.
2. Work on a weakness.
 - a. Think of partnering with someone who is super competent in 1 area of weakness you have. Ask them to coach you.
 - b. Invite contributors to opt into peer mentorship, too.
3. Q&A/discussion
 - a. What kind of help would you like to have while planning an event or project? Where do you need to delegate some of the work?
 - b. How do you identify and work to address areas of weakness in your facilitation or open leadership practice?
 - c. What are your pro tips for finding coaches, mentors, and professional development that can help you address your weaknesses?



Part 2

This part of the training should take about 45 minutes.



1. Make meaning before practicing skills.

10 minutes

1. Start with a hands-on task that invites some kind of acting, making, modeling, or performing that allows for multiple entry points into the learning and work.
 - a. The big idea is to introduce vocab & help learners create their own mental models before working on something technical.
 - b. Plan for differentiation: everyone is different & differently abled. Plan a menu according to people's needs.
 - c. Consider forming loose affiliations with other projects that do similar work in different ways. For example, if you run a coding project in open data, you might also connect with an open data project for teachers and another for citizens so that you can refer contributors who don't fit your project to other projects that need their help.
2. Q&A/discussion
 - a. What are some issues you can file at the beginning of an event or project that allow multiple, different forms of engagement with the work?
 - b. What are your pro tips for matchmaking between contributors and tasks?
 - c. How can you use visioning, personas, contribution guidelines, and other forms of storytelling to include several kinds of contributors in your work?

A Grumpy Cat is positioned behind a semi-transparent pink rectangular banner. The background features a large, intricate, golden-yellow fractal pattern on the left and a colorful, pixelated mosaic on the right.

2. Always be prepared.

10 minutes

1. Outline and prepare plans B, C, & D.
 - a. Sometimes technology fails.
 - b. Sometimes your audience wants to go somewhere else.
 - c. Sometimes your activities fail.
2. You might...
 - a. Work offline.
 - b. Work in larger or smaller groups.
 - c. Chunk issues or tasks into smaller pieces of work.
 - d. Stop to assess what's happening & then explain and begin a piece of work again, but differently.
3. Q&A/discussion
 - a. How do you read an audience or community to follow its lead?
 - b. Have you ever been at an event or working on a project that stopped doing something ineffective to reboot? How did it go? How did the event or project leads do it?
 - c. What are your pro tips for when things go wrong?

A decorative graphic featuring a white cat with blue eyes (Grumpy Cat) peeking over a pink rectangular banner. To the left of the banner is a large, intricate, golden-yellow mandala. To the right is a colorful, pixelated square pattern. The banner contains the text '3. Design for feedback.'

3. Design for feedback.

10 minutes

1. Gather big-loop feedback before and after an event.
 - a. Survey your audience before & after an event.
 - b. Get peer and stakeholder feedback on your plans.
 - c. Debrief quickly after an event to capture your learning.
2. Gather small-loop feedback during an event.
 - a. Plan to pause and ask your audience about each activity.
 - b. Remind yourself to stop, look, & listen to the room.
 - c. Check in with co-presenters to adjust on the fly.
3. Q&A/discussion
 - a. What are some good feedback methods or tools you use or have seen used in events or projects before?
 - b. How do you keep track of feedback you receive?
 - c. What are your pro tips for prioritizing and acting on feedback?

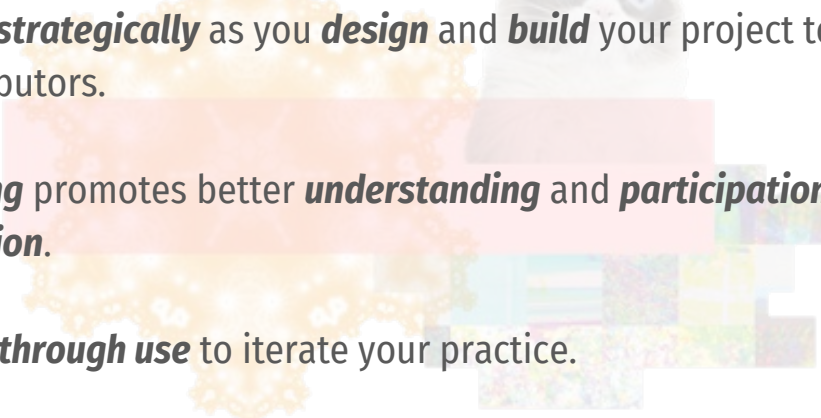


4. Follow up.

10 minutes

1. Gather contact info. Invite attendees to opt in to a mailing list that connects them with one another.
2. Share your next steps and invite suggestions and contributions from attendees - and suggest ways contributors could take their own next steps with the project.
3. Invite interested contributors & attendees to spread the event and maintain its resources.
4. Document your learning. Your reflection on your last event begins your planning for the next.
5. Q&A/discussion
 - a. What are some of your favorite survey tools?
 - b. How do you measure whether or not an event or project has been successful? What do you need to set up before an event or project starts to be able to do that?
 - c. What are your pro tips for keeping an audience or community engaged after an event or project ends or goes into maintenance?

The big idea(s)

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- Think **strategically** as you **design** and **build** your project to **empower** contributors.
 - **Sharing** promotes better **understanding** and **participation & inclusion**.
 - **Learn through use** to iterate your practice.
 - Your facilitation will **improve**.

5 minutes

- Think **strategically** about how to **design** and **build** your event to **empower** contributors to achieve their goals. Be open-by-design, not just open-by-default.
- **Share** as much **decision-making, information, & content** as possible.
- Help contributors **understand** your project vision, workflows, and expectations for participation and behavior. The more they understand, the better off your project will be in terms of **participation & inclusion** people get involved and engaged.
- **Learn** from every event & iterate your **open leadership** practice.
- Your facilitation will **improve**, become **more efficient**, & **reach more people** over time.
- Q&A/discussion
 - What do you wonder about facilitation or open leadership after this training?
 - What are you looking forward to trying as a result of this training?
 - How might you use parts of this training with your own project communities?
 - How might you adapt, change, or improve this training?

Stay in touch

- If you have questions or suggestions about this training or these materials, contact [Chad Sansing](#), curriculum manager on the Open Leadership & Events team.
- If you have questions about the Global Sprint, contact your coach or mentor or email globalsprint@mozillafoundation.org.
- If you'd like to explore other ways to get involved in open leadership programs, check out [next steps](#) on the [Open Leadership Framework](#).
- Blog about what you've learned, how you've applied it, and connections you've made. Share at leadopen@mozillafoundation.org.

< 5 minutes

Be sure to thank participants again for all of their attention, insights, and service to their communities.

Also, encourage them to blog about what they've learned, how they've applied it to their events and projects, and how they've made new connections between projects and communities through facilitation and open leadership. Invite them to share their stories with leadopen@mozillafoundation.org/