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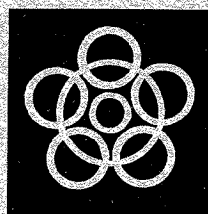
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July 1988

The
**MEETING FACILITATOR'S
GUIDEBOOK**



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The

MEETING FACILITATOR'S

GUIDEBOOK

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for

BONNEVILLE POWER ADMINISTRATION

Portland, Oregon

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How to Use This Guide

If part of your job is to lead or facilitate meetings, in any setting, then this guidebook is for you. Although its primary focus and examples are on meetings held with the public and other agencies outside Bonneville Power Administration, the principles of meeting facilitation are the same anywhere, be it in a meeting with staffs, project teams, managers, the general public, special interest groups, or other agencies.

Being an effective meeting facilitator is a function that few professional people are trained or prepared for, but are expected to perform. Although some individuals are "naturals" at it, most people can learn these skills. This material was compiled as a short reference to learning the skills of planning and facilitating interactive meetings. It is a compendium of attitudes, principles, practices, and procedures used by competent meeting facilitators in organizations and businesses. In a sense, it is also a guidebook on conflict resolution.

And it's brief. It's meant to be read or referenced each time you prepare to facilitate a meeting. It weaves together "how-to" information condensed from various training materials, books, and publications, along with the author's fifteen years of experience.

Use this guidebook as a friend, as a short, concise hip-pocket guide, sort of a "Lazy Man's Guide..." to meeting facilitation. It is a support for you when faced with leading a difficult meeting and time is short, a source of creative ideas and practical advice. Skill, of course, comes with practice. Mastery comes with experience and focused attention.

So read, enjoy, and may you find great satisfaction in the practice of cultivating harmony in action – within yourself and with groups who struggle with the problems of daily life.

The Meeting Facilitator's Guidebook

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Part I

What is a Meeting Facilitator?

What Is a Meeting Facilitator?

A facilitator is someone who makes it easier for other people to accomplish a task or achieve a goal. Facilitators support other people. Like mediators, they do not exercise power over others. Rather, they use their skills of communication, observation, and group problem-solving to empower others, to bring out the best in individuals and groups with whom they work.

Meeting facilitators empower groups of people to work as a cooperative whole. They enable a group, for its brief life span of hours or days, to live and breathe as a creative, productive entity. Someone said that "magic is the art of turning negatives into positives, of spinning straw into gold." Sometimes facilitators seem like magicians. They move into the middle of turmoil and boiling emotions with undeterred calm and spin opposing forces into creative conflict resolution.

Facilitators blow life into groups when their energy wanes by sharing their own enthusiasm and suggesting ways to get the blood flowing. With their unwavering commitment to the group task, they are the compass that brings errant groups back on course. They help synergize disparate personalities in a group, bringing them into harmony, as a conductor moves an orchestra with the sweep of a hand and the nod of a head, calling forth a faint violin, toning down an ambitious tuba.

This is not to say that facilitators are responsible for groups or can help them avoid all the pain or conflict that is natural to change and problem-solving. What they can do is help groups recognize conflict and redirect negative energy toward cooperation, avoiding the time, money, and emotional drain of adversarial tactics, of resisting each other rather than working it out.

And it is happening every day. For example:

- ☐ The director of a state agency is experiencing friction and disagreement on a coordinated project between her staff and the staff of a local municipal program. She invites the top managers of both agencies to meet for a day to share perceptions, talk about conflicts, and create more team cooperation. They cautiously agree and request that the meeting be led by an impartial, third-party "facilitator." The meeting results in deeper understanding and an agreed-upon set of ground rules for future communication and teamwork.
- ☐ The chairman of the board of a local utility plans to hold a community meeting to review alternatives for a new hydroelectric facility. The meeting is expected to be volatile. Though he will officially chair the meeting, he

Facilitate: To make easier.

Ease: the state of being comfortable, as a: freedom from pain or discomfort b: freedom from care c: freedom from labor or difficulty d: freedom from embarrassment or constraint...

– Webster's Dictionary

insists that a well-respected local civic leader serve as "facilitator." After the meeting, several citizens compliment and thank the chairman for a "good meeting" and their first opportunity to be fully heard on the issue, even though they will continue to oppose the proposal. They request another meeting.

- ☐ The chief executive officer of a major bank in the Northwest sends all his managers to a seminar on meeting facilitation, as part of an effort to improve cooperative problem-solving and decision-making within his organization.
- ☐ The manager of a burgeoning farmer's market cooperative calls an annual meeting of its 100 vendors to make plans for its summer season. A "facilitator" leads the workshop process, hosted by the board of directors. The vendors find themselves cooperatively solving problems that previously divided individuals and created factions and competition for space.

These are only a handful of examples of a transformation that is occurring in the world of business and organizations. As John Naisbitt, author of *Megatrends*, says, "the new leader is a facilitator, not an order giver." The concept of leader as "facilitator" has emerged in the past two decades as traditional, hierarchical, military-like structures of organization and decision-making have evolved toward more openness and flexibility, toward more shared responsibility for problem-solving, consensus decision-making, and participatory management.

More people are active in solving social and environmental problems, while the problems themselves have become more complex. The value of community and teamwork is increasing as we seek a form of unity within diversity. As we recognize our growing interdependence both nationally and globally, and as we confront mind-boggling complexities in issues that affect our lives and our environment in every way, we are challenged to listen harder to each other, to learn faster, to find new ways to solve our problems peacefully and cooperatively.

Community, consensus, and team work are all built from groups. And groups are dependent on meetings. Making meetings work well has, therefore, become a new art and science. "*Roberts Rules of Order*" has guided group process and decision-making in our culture for decades. But these more rigid, parliamentary procedures are often not interactive or flexible enough to accommodate more consensus-based problem-solving.

We need a new "rules for facilitation" responsive to the needs of managers, decision-makers, and citizens in business, organizations, and communities. Actually, facilitation is not built so much on rules, as on an emerging and consistent set of attitudes, principles, practices, and procedures about groups, and how individuals can work together in groups to solve problems collaboratively.

The Facilitator's Purpose

You empower yourself as a facilitator with a clearly stated purpose. Successful facilitators evoke a clear vision and feeling for this purpose before every meeting, knowing that if their purpose is always clear to them and to others, they will intuitively make the right moves under pressure. Briefly stated:

A FACILITATOR'S PURPOSE IS TO MAKE IT AS EASY
AS POSSIBLE FOR ALL PARTICIPANTS TO COOPERATE
IN ACHIEVING THEIR MEETING GOAL OR TASK.

In other words, your purpose as facilitator is to observe the meeting process, moderate the flow of discussion, and help the group work as efficiently, productively, and creatively as possible in the time allowed to complete its task.

STATEMENT OF PURPOSE

My purpose as a meeting facilitator is to help make it easy for people to speak freely and listen carefully, share information and cooperate wholeheartedly, envision positively, and create collaboratively.

I free people from their fears of not being heard, of being pre-judged or attacked, by demonstrating openness, neutrality, and respectful acceptance of everyone in the group.

I help a group to focus on its task, and open pathways to mutual understanding and problem-solving. Each time I serve as a meeting facilitator, I deepen my own awareness and ability to communicate and work cooperatively.

"...If you can develop the skills of facilitating people's involvement in decision-making processes, you can become a very effective leader in your community and in your work. The new leader is a facilitator, not an order giver."

*— John Naisbitt
Megatrends*

Functions of The Facilitator

Following is a list of the functions or tasks of a facilitator in planning and conducting meetings. Parts II and III of this guidebook will describe each of these functions. For now, it will help you to become familiar with this list.

PLANNING THE MEETING

Meeting facilitators are also meeting planners. If others are responsible for planning the meeting, the facilitator will at least monitor the process, review the plans, and make suggestions where there may be problems, especially regarding the agenda and meeting format.

The facilitator may assist with...

- Stating the purpose and desired results.
- Inviting the participants.
- Selecting a meeting place.
- Designing a format, agenda and groundrules.
- Preparing meeting information.
- Assigning meeting roles.

WHEN THE MEETING BEGINS

Working with the meeting chairperson and other staff, the facilitator makes sure the meeting gets started in a positive way.

The facilitator...

- Assures final meeting preparations.
- Assures that participants are welcomed and comfortable.
- Helps to establish trust and rapport.
- Explains the role of facilitator.
- Secures agreement on meeting purpose and groundrules.
- Reviews the agenda (or develops it if there isn't one) and resolves any problems with it.

DURING THE MEETING

QUOTES & NOTES

Throughout the meeting, facilitators carefully observe both the meeting process (what is happening among participants, their communication) and the content or subject matter. They listen and watch carefully, calling on people and making suggestions that help the meeting move along.

The facilitator....

- Remains neutral and impartial.
- Moderates the flow of discussion.
- Clarifies information.
- Protects individuals and their ideas from attack.
- Helps people listen to each other and share discussion.
- Accepts emotion and feelings; helps channel hostility, resistance, competition into productive discussion.
- Keeps the group focused on a common task and avoids side-tracking.
- Helps avoid repetition.
- Paces (speeds up or slows down discussion).
- Assures all points of view are expressed and understood.
- Clarifies areas of agreement and disagreement.
- Summarizes and checks for completion of each agenda item.
- States and restates the progress of the meeting.
- Suggests alternative discussion methods if something is not working.
- Helps the group find win/win solutions or reach consensus or compromise as appropriate.
- Helps maintain a sense of humor.
- Deals with problem people such as interrupters, monopolizers, late-comers.
- Works with a recorder. Assures that all comments are recorded in some way.
- Brings meeting to closure.

Facilitation Styles

Some facilitators actively moderate the entire meeting, keeping tight reins on the discussion process, while others take a more passive role, silently observing the meeting and intervening occasionally if the group gets stuck, side-tracked, or in a conflict.

Responsibility for problem-solving or achieving the purpose of the meeting should rest with the entire group. A facilitator should never talk more than is minimally necessary to support the group process. He or she is not a leader in the sense of having authority to make decisions, or being responsible to find solutions for the group. Naturally, more active facilitation is required when groups have problems — when they are highly volatile, when some people tend to dominate at the expense of others, when a group is sluggish or confused, or when people are going in different directions at the same time.

Facilitators often work as a team with a chairperson or someone "in charge" of a meeting. Sometimes they work alone. There are different degrees of or styles of facilitation.

- ☐ The chairperson may open the meeting, then turn it over to the facilitator, who moderates the rest of the meeting, or may ask the facilitator to step in to moderate specific parts of the agenda such as the question-and-answer period or specific group discussions.
- ☐ For some meetings, the chairperson is also the designated facilitator, in which case he or she takes a totally neutral role to help the group achieve its task or purpose in meeting. There are no hard and fast rules here. You need to determine the style and degree of facilitation most appropriate for your meeting.

When To Be a Facilitator

Ideally, we should all be facilitators by using facilitative attitudes and behavior whenever we are working cooperatively with a group toward a common goal or task. The best meetings are often those in which everyone sees himself/herself as a facilitator. For each meeting, though, a group can assign the formal role of facilitator to a specific individual. This can be someone inside or outside your organization.

You don't have to be highly experienced to be a good facilitator. You should genuinely enjoy working with groups of people, be able to look objectively at your own strengths and weaknesses, and allow yourself to make mistakes and learn from them. If you are sincere, you will help a group more than you will hinder it, even if you have little experience.

For controversial meetings, the facilitator should not be directly or personally involved in the issue under discussion. Facilitators should be trusted as open-minded and impartial individuals whose role is to protect everyone's interests during the meeting. Most importantly, a facilitator should not serve any other role during a meeting, especially that of a technical or informational resource person.

Facilitation is a role beneficial to anyone who works cooperatively with other people. Those who become highly proficient at it usually excel at a number of skills:

TRAITS OF EFFECTIVE FACILITATORS

- Ability to listen and observe
- Ability to remain impartial and engender trust and rapport
- Patience
- Honesty
- Sense of humor
- Intuition
- Objectivity
- Articulateness
- Ability to work in front of a group
- Awareness of consensus-building and problem-solving processes
- Awareness of group dynamics

WHEN TO FACILITATE YOUR OWN MEETINGS

Practically speaking, an agency like BPA cannot always afford to bring in a neutral, independent, professional facilitator for every public meeting or meeting held outside of the agency. As public agencies recognize the value and benefits of using meeting facilitators, they must also create the resources for doing this. It's a new role and a new skill not currently in most job descriptions.

Sometimes it is possible to be a facilitator for meetings related to projects or programs for which you are responsible. Managers can be facilitators for their own staff meetings. Project coordinators can be facilitators, if they have the skills, for some small informal meetings in communities or with people from different agencies.

To facilitate your own meetings you should be able to answer "yes" to the following four questions:

1. Can you remain impartial or neutral on the topics under discussion?
2. Can you protect everyone's right to be heard and express their interests?
3. Can you engender trust and cooperation from all participants?
4. Do you fully understand the role of the facilitator?

WHEN NOT TO FACILITATE YOUR OWN MEETINGS

Be honest with yourself. If you can't give a clear "yes" to the above four questions, ask someone else to facilitate. When you are responsible for holding a controversial meeting on a complex issue with people representing different or opposing interests, participants may not view you as truly neutral if you are "the boss," if you are working directly on the project involved, or sometimes simply because you are from the responsible agency. In such cases, be the chairman or a resource person and find yourself a good facilitator.

To select the facilitator you have several options, depending on the constraints of your situation:

- ☐ Use someone on the project team or staff who has the experience or potential to be a facilitator but is not highly visible in the project.
- ☐ Use someone with facilitative skills from another office, division, or staff within BPA.
- ☐ Use a "lay person" outside BPA. This could be someone from the community or another agency who is respected as a mediator or neutral leader.
- ☐ Use a professional facilitator.

Facilitator Attitudes & Beliefs

The most successful facilitators are people who embody a certain set of attitudes and beliefs about themselves and about cooperative problem-solving. These attitudes provide them a personal and professional philosophy that guides their actions. **It is not, after all, the techniques of facilitation that make you effective but rather the way in which they are used.** A technique used without any inner commitment to the group as a whole and to shared participation may be seen as insincere and manipulative.

Whatever we believe determines who we are and how we behave. When we believe that others are not to be trusted, we behave toward them with hostility, suspicion, and fear. When we believe that someone genuinely cares about us, we find ourselves relaxing around them and easily disclosing our honest feelings and intentions. Our attitudes toward other people and about ourselves are powerful influences on our communication.

*"We must change who we are,
as well as what we do."*

– Athos & Pascale
The Art of Japanese
Management

Here is how a facilitator might describe her/his attitudes and beliefs about communication and cooperative problem-solving:

TRUST AND MUTUAL SUPPORT

As I openly and completely support every individual in the group, I free individuals to support and trust each other so together we can accomplish the purpose of our meeting. This support frees people to concentrate fully on the content of the meeting, and to speak and listen in a meaningful way.

INDIVIDUAL SELF-WORTH

I find value and inherent self-worth in every individual. My positive feeling and acceptance of others encourages full sharing and cooperation. I respect every individual's right to express his or her point of view and find all points of view worthy of this expression.

FEELINGS AND EMOTIONS

Our feelings – even our fears, anger, and pain – are valued as part of our lives. We cannot express ourselves fully without also expressing our feelings and emotions. The more we remain silent about our negative feelings, the more separated and alienated we become. As a facilitator, I do not reject or disapprove of feelings or emotions. I accept and recognize these feelings, encourage their expression, and help people to channel their feelings into constructive listening and dialogue.

OPENNESS AND NON-JUDGMENT

Being judgemental and critical of other people creates defensiveness and limits the free expression and exchange of ideas and concerns. To keep an open mind, I must allow myself to be in a state of suspended judgment. Until I cease judging others, I am not fully open and at peace within myself. Being a good listener requires the suspension of judgment.

RAPPORT

When I am in rapport with others, I am at the peak of cooperation and creativity. Rapport creates trust and a willingness to work together. I create rapport by seeing how we are alike, rather than how we are different. This establishes a feeling of equality and mutual acceptance.

DISAGREEMENT

When I accept others and establish rapport, I create an environment in which we can respectfully disagree with each other and work on resolving our disagreements without rejecting each other or becoming adversaries.

LISTENING

The quality of my listening is as important as the quality of my talking. When I listen in a non-defensive, non-judgmental way I allow others to express their opinions and ideas freely and fully. I listen non-defensively when I am not evaluating each thought and mentally preparing a response or defense to what someone else is saying. I listen non-judgmentally when I hear them as if I were in their shoes.

HONESTY

I must be totally honest with myself and others at all times.

INFORMATION

Information is power. Without adequate information, people feel distrustful and powerless to protect their own interests. When we withhold or control information, we create fear and resistance. As a facilitator, I help provide people with the information they need to build trust and rapport and to participate in an informed and knowledgeable manner.

COMPETITION AND COOPERATION

Competition can be destructive to group problem-solving. It creates an adversarial, win/lose form of communication. It creates closed debate and posturing rather than open discussion. As a facilitator, I seek to avoid competition and support people in finding cooperative ways to share information and solve problems.

"To resolve these issues, each person has to take a good look at the other point of view and listen carefully to what the other side is saying. And for just a brief time, each person should put him or herself in the other's place, should try to recognize that finally, in the end, one man's need is often everyman's need."

— Robert Redford
Harvard Business
Review

Understanding Conflict and Consensus

Just as the nucleus of every cell contains the blueprint for the whole body, every meeting can contain the blueprint for consensus, for transformation of a problem or a goal into a solution or an action.

The best facilitators build in the principles for consensus at each meeting. This requires knowledge of the consensus-building process and cooperative group problem-solving. This section will give you a concise overview of the nature of conflict and consensus. Some suggestions for further reading and study are contained in the appendix.

CONFLICT

Whenever we create change, we can expect conflict. Conflict, in itself, is natural and often healthy, necessary to the processes of life and growth. It is our response to conflict that determines whether it will be a creative or destructive force in our lives...a danger or an opportunity.

The Chinese term for 'crisis' – wei ji – is composed of the characters for 'danger' and 'opportunity'

Always the first step in managing or resolving conflict is to acknowledge it, not to fear it, even to welcome the opportunity it presents for discovering new ways to understand ourselves and others, to bond together in problem-solving, and to invent the means to free ourselves from the problem.

CONFLICT RESPONSE

We can respond to conflict in different ways at different times. We can **compete** and pursue our own concerns at the expense of others; we can **accommodate** and satisfy someone else's concerns at the expense of our own; we can **avoid** conflict by refusing to deal with it in any way; we can **compromise** by seeking an expedient solution that partially satisfies all parties; or, finally, we can **cooperate** (or collaborate) and attempt to work with the other parties to find a solution which satisfies the concerns of all persons or parties.

Five conflict behaviors:

- *compete*
- *accommodate*
- *avoid*
- *compromise*
- *cooperate or collaborate*

An effective problem-solver or negotiator uses all five modes, although most of us use some modes better than others. Each of the five modes is appropriate at some time depending on the situation, and each mode can be ineffective if used at the wrong time.

For example, in a volatile confrontation between disputing groups it might be better to **avoid** the issue for the moment and give people a chance to cool down,

QUOTES & NOTES

"There's nothing wrong with winning, provided that what you are winning is a contest."

– Dobson & Miller
Giving In To Get
Your Way

"It is alien to the Hopi to settle matters out of hand by majority vote. Such a vote leaves a dissatisfied minority, which makes them very uneasy. Their natural way of doing it is to discuss it among themselves at great length, and group by group, until public opinion as a whole has settled overwhelmingly in one direction."

– Hopi Agent,
Bureau of Indian
Affairs

setting a future date to meet and talk. However, if the leaders of the groups later refuse to meet and talk, this kind of **avoidance** can sabotage any progress toward settlement.

Competition may be appropriate for a construction company out to capture a share of the home-building market for its product, but could be destructive among employees of the company trying to work together in **cooperative** teams on the job.

COOPERATION

Cooperation (also called collaboration) is the most desirable mode for group problem-solving and for generating broad support for final plans and decisions affecting groups of people. It is a process in which people of different interests or values agree to work together to seek solutions to common problems; solutions which, at best, provide for mutual gain, and, at worst, do not harm any party. It is built on the premise that "for me to win, you don't have to lose." In other words, all interests work together as creatively as possible to find "win/win" solutions rather than "win/lose" competitive or authoritarian solutions, avoiding quick and easy compromises that are not wholeheartedly supported by all involved parties.

CONSENSUS

The process and product of decision-making that embodies the principles of cooperation is called consensus. Consensus is based on the belief that each person has some part of the truth, and that we will reach a better decision by putting all the pieces of the truth together before proceeding.

Consensus is reached when everyone in a group agrees to support a solution or decision, even if they do not think it is the "best solution." In other words, they "agree to agree" and feel they can live with the solution without feeling compromised or harmed in any way. Consensus allows people to try to balance their own interests with the "good of the whole." Because they have taken full responsibility to solve a problem with others, they have not been coerced or forced into a decision. Consensus takes time and individual responsibility and often requires the assistance of a facilitator. Decisions are not made quickly by voting. Rather, discussion continues, step by step, until the problem is thoroughly understood, everyone agrees that a solution is necessary, all ways to solve the problem have been discussed and evaluated, and the group is ready to support a single action.

THE PROBLEM-SOLVING PROCESS

Most solutions to problems are arrived at through a process, through thoughtful analysis over time. This process can last from minutes to months. Every process, though, inherently contains five steps or phases.

PHASES OF PROBLEM-SOLVING/DECISION-MAKING

- Defining the problem and related issues and concerns
- Identifying criteria for solutions
- Developing alternative solutions
- Evaluating and comparing alternative solutions
- Agreeing on a solution

Sometimes several phases occur at once. The main point for a problem-solver is that each step needs some degree of attention and thought in order to arrive at creative, effective solutions. It is often said that once one fully defines the problem, the solution becomes apparent. A common mistake in groups is that they jump into debating solutions before the problem is fully defined, and before everyone has had a chance to identify his/her interests and help generate ideas for solutions.

In the public arena, many people may be affected by a social or environmental problem and therefore have an interest in the solution. In order to develop consensus agreement for final plans, policies, or actions, those who are expected to support final decisions need the opportunity to participate, in some way, in the steps of the process, the steps of problem-solving. This participation can range from passive (observing the process, becoming informed on the issues) to active (participating in discussions and meetings and offering ideas and opinions).

Meeting facilitators help people solve problems and build consensus step-by-step through the meeting process. They encourage open discussion to understand the problem fully and to explore all possible solutions. They seek ways to protect people from harm and to develop solutions in the best interest of all concerned. Although it may be difficult and confusing to try to bring all affected groups into a planning process, the alternative of closed, hierarchical decision-making is often far less acceptable or successful.

Group problem-solving and participatory planning can be chaotic and destructive without an agreed-upon process and procedures. Because many people may be involved, open participation requires some process groundrules. These groundrules help set the procedures for meetings and for working together in ways that everyone can trust and support. They assure everyone a voice, while recognizing the need for a manageable process.

Leadership is best when the people say, "we did it ourselves."

— Lao Tse

"Together we can solve the problem; it is our opponent, not each other."

– Gandhi

"A problem is never too big to run away from."

– Charlie Brown

GROUNDRULES FOR CONSENSUS

- Recognition of a common problem or goal
- Willingness to cooperate and work together
- Agreement on a common process and groundrules for working together, including procedures for decision-making if consensus can't be achieved
- Full access to information and sharing of information by all participants
- Opportunity to participate fully in the process and to be heard
- Adequate time for full discussion, information sharing and education
- Individual responsibility to
 - Listen and learn
 - Consider all points of view
 - Seek the best solution
 - Balance the good of the whole with self-interest
 - Believe that a solution can be found and that consensus can be achieved.

Note: For a full discussion on how to design a public participation plan, please see the BPA Public Involvement Guide.

MEETINGS

Meetings provide the forum for cooperative problem-solving and involvement. Sometimes, it takes many meetings to develop a plan or policy, or solve a problem. Other times, a specific issue can be resolved in one or two meetings. Meetings are the stepping-stones along the path of consensus.

Too many meetings are draining and can slow the process down. Too few meetings can leave people uninvolved and in the dark, building up distrust and confusion. Each meeting, to be effective, must contribute to the progress of consensus-building. Each meeting must be carefully planned and facilitated in the spirit of cooperation.

FACILITATOR'S ROLE

The consensus process works best with a facilitator who helps to plan meetings and keep meetings focused and moving at a productive pace. In a sense, the facilitator acts like a mediator, serving as an impartial party helping the participants listen to each other, explore win/win solutions, and reach consensus or compromise. Without a facilitator, groups can become stuck, get side-tracked into competitive debate and win/lose tactics, or separate into "us/them" camps.

WHEN CONSENSUS CAN'T BE ACHIEVED

QUOTES & NOTES

If consensus cannot be reached in the time available, a group can always fall back on another method like voting or executive decision. Even in this case, the experience of searching for consensus encourages everyone to develop a deeper understanding of complex issues and generates higher satisfaction and more creativity in developing the best possible solutions or actions.

Consensus is not effective for choosing the lesser of two evils or for deciding among bad alternatives. If someone feels that all choices unfairly harm them, consensus is not possible. It works best when participants help develop solutions as well as evaluate them. Cooperation can help assure that all possible win/win solutions or compromise solutions have been generated.

When consensus works – and it does work, again and again – it builds not only solid support for a decision but also creates a personal sense of triumph and a new understanding and level of cooperation among the people involved.

The facilitator takes this spirit and vision into the planning and facilitating of each meeting.

"The process requires maturity and flexibility, along with willingness to give way for the good of the group, to listen rather than hold forth, to invent rather than insist. Consensus calls forth the best that is in us, and so empowers us to work together in community."

– Starhawk
Dreaming the Dark

Part II

Meeting Planning & Preparation

Planning the Meeting

A wise facilitator involves himself/herself in each element of meeting planning. A great chef would never begin the souffle without proper ingredients, nor would a bridge engineer attempt to span a river with a weak structure. Likewise, facilitators cannot easily achieve success with poor meeting preparation and materials. This part of the guidebook will take you through the steps in planning a meeting. The information is general. It will give you ideas on how to state your purpose, design an agenda, select appropriate discussion methods, and assign meeting roles to other staff members. You must be flexible and use your own imagination and creativity to tailor the meeting purpose and agenda to fit your own situation.

ELEMENTS OF PLANNING

- Stating the purpose and desired results
- Inviting participants
- Selecting a meeting place
- Designing a format and agenda
- Preparing meeting information
- Selecting meeting groundrules
- Assigning meeting roles

Often, inside a large agency such as BPA, many people may be involved in planning a meeting, including participants from outside the agency. One person may be responsible for publicity and mailings, another for setting the agenda, and another for arranging facilities. This can lead to fragmented or superficial planning. Though facilitators may not be responsible for carrying out all preparation activities, they can play an invaluable role by coordinating or assisting in this process to assure a smooth and successful meeting.

Part II contains the basics of meeting planning, including methods for planning group discussions and interactive meeting agendas, the tools of group problem-solving.

To help you begin, you might use a planning form like the following:

"The key to success of any meeting, regardless of how it is run, is planning and preparation."

— Doyle & Strauss
How To Make
Meetings Work

MEETING PLANNING SHEET 1

MEETING SUBJECT:

Meeting Coordinator:

Date: _____ Location: _____

Time: _____ Meeting Place: _____

PURPOSE:

DESIRED RESULTS:

PARTICIPANTS:

AGENDA:

Minutes: _____ Agenda Topics: _____ Method: _____

MEETING PLANNING SHEET 2

ROOM FORMAT & ARRANGEMENTS:

MEETING STAFF ASSIGNED:

Chairperson: _____ Recorder: _____

Facilitator: _____ Resource Persons: _____

INFORMATION TO BE PROVIDED (describe):

Presentations (who, what, how long):

Audio/Visual Aids (maps, charts, A/V equipment):

Printed Information at Meeting:

Pre-mailed Information:

Notification Process & Media Contacts:

MEETING SUPPLIES & OTHER NOTES:

Stating the Purpose and Desired Results

*"No wind favors a ship
without a port of destination."*
– William Reed
Aikido Instructor

Clarifying the meeting purpose and desired results is a crucial first step in planning a successful meeting. Very few meetings are held to make final decisions. Most meetings are held to work on some phase or step in the planning or decision-making process. Being clear on just what you do and don't expect to accomplish in a meeting leads everyone to a focused agenda.

Most meetings outside BPA – with the public, customers or other agencies – are called to involve the participants in a specific step in problem-solving, or in the planning process. If you are planning a meeting, the first question to ask is whether you can identify the step in problem-solving this meeting relates to. Some meetings involve more than one step. Occasionally, you may solve an entire problem in one meeting and cover all the steps. Or the meeting may focus entirely on one step, such as sharing information about the problem.

Here, again, are the five steps or phases of decision-making or group problem-solving. Your meeting purpose should reflect some phase of this process.

*"Whether riding a bicycle,
threading a needle, or solving
a problem, even our
performance in very small
things depends on having
a clear picture of the desired
result, and appropriate
feedback on how we are doing."*
– William Reed
Aikido Instructor

PHASES OF GROUP PROBLEM-SOLVING

- Define a problem and related issues and concerns
- Develop criteria for solutions
- Develop alternative solutions
- Evaluate and compare solutions
- Agree on a solution

The following chart may help you to write a clear statement of purpose and desired results for your meeting.

MEETING PURPOSE & RESULTS

PURPOSE

POSSIBLE DESIRED RESULTS

To define and understand a problem, need, or goal.

- Increased understanding and awareness regarding all aspects of the problem.
- Agreement on the definition of a problem or goal.
- Agreement to solve the problem, achieve the goal.

To identify related issues, concerns, and the interests of people affected by the problem.

- Awareness of different groups and individuals affected by the problem or situation.
- A full "scoping" or listing of everyone's issues and concerns.
- Understanding the differences in interests.
- Awareness of potential conflicts.
- Awareness of opportunities for resolving conflicts.

To agree on a participatory process; to develop objectives or criteria.

- Agreement on a process – on steps, ground rules, schedules and procedures for working together.
- Agreement on a public involvement plan.
- Agreement on objectives or criteria for solutions (such as environmental, physical, economic).

To develop alternative solutions.

- A list of potential solutions or parts of solutions.
- Ideas for protecting different interests and for mitigating or avoiding negative effects of solutions on different groups or individuals.

To evaluate and compare alternative solutions.

- Rating of alternatives according to criteria such as:
 - strengths and weaknesses of alternatives
 - effectiveness in solving the problem
 - level of impacts.
- Comparison and ranking of alternatives.
- Identification of areas of agreement and disagreement.

To achieve consensus on a solution, plan, or action.

- Ideas for modifying alternatives to build further consensus.
- Agreement and support to implement an action or solution.

Inviting Participants

Poor participation and inappropriate expectations are the nemesis of many well-planned meetings, both internally and with the public. Here are some guidelines that will help facilitators and meeting planners avoid these hazards.

- ☐ **Make a specific list of those you want at the meeting.** Network and check the list with others to insure that it is representative of all interests, points of view, or areas of expertise that you wish to involve. List specific local leaders and groups that you would like to have represented at your meeting to insure a productive discussion.
- ☐ **Mail or telephone a direct invitation** to this list. Ask each group to select and send representatives. Make the invitation personal and important. Follow up with a second phone call or another mailed reminder. Post cards with a note several days before the meeting can be very effective.
- ☐ **Clearly communicate the meeting purpose.** Let people know what to expect. When possible, mail out the agenda.
- ☐ **Provide pre-meeting information.** If participants need to be informed on issues or background information, provide this. Lack of information builds distrust and a feeling of powerlessness.
- ☐ **Use networking as a powerful tool.** Use it to reach people and motivate participation. Nothing substitutes for direct, personal contact in reaching people. Get on the phone and talk to leaders of groups, local officials, and other community contacts. Ask these people for help in notifying others. Even if your meeting is public and there are notices in the media, target your participation through this process of direct contact to assure that important groups and interests are informed and represented.
- ☐ **Estimate attendance.** Good networking will give you a feeling for this. You need to have a general idea of how many people to expect in order to plan your discussion methods. If unsure, use the larger, not smaller estimate, to be sure you have adequate meeting space and materials.

"Participants will steadfastly refuse to attend a meeting they never heard about."

– Anonymous

"Networking was now a verb, and it was done by conferences, phone calls, air travel, books... photocopying, lectures, workshops, parties, grapevines, mutual friends...tapes, newsletters."

– Marilyn Ferguson
Aquarian Conspiracy

Selecting a Meeting Place

The meeting environment is important in establishing comfort and rapport, and deserves careful attention in planning.

- ☐ **Choose a building that is "user friendly"** and not intimidating to participants. Church halls, local meeting halls, and schools are often more inviting than government buildings, institutions, or confusing university campuses, although these places are often acceptable and more familiar to local officials or other agency personnel.
- ☐ **Check for accessibility** — good parking, access for elderly and handicapped, easy location of the meeting room.
- ☐ **Check that the meeting room is conducive to agenda and format**, i.e. movable tables and chairs, no visual obstructions, good lighting, large enough for big groups, not too large or overwhelming for small groups.
- ☐ **Insist on adequate wall space** for displaying charts, maps and other material. The visual display can help the meeting come alive with information.
- ☐ **Network your way to finding the best space you can.** Call people who know the community. Visit the meeting room to check on the space and to become aware of any constraints. If you can't visit, telephone someone who knows the space and ask specific questions about the room, walls, tables and chairs, etc. Always secure the name and phone number of a contact person who will make sure the room is open and prepared when you arrive for the meeting set-up.
- ☐ **Think about the participants.** If a meeting place is hard to find, in an intimidating building, or in a poorly ventilated, cramped room, people may get the message that nobody really cares about the meeting. On the other hand, meetings held in an overly affluent setting, like an expensive hotel, may send a different message — one of being too extravagant or showy.

Designing an Interactive Format and Agenda

Once you have clarified your meeting purpose and desired results, and identified participants, you are ready to design the meeting **process** — to set an agenda and select a format for group interaction.

Meetings can be structured to inhibit or facilitate audience participation. In meetings held outside an agency such as BPA, there are basically three types of meetings:

- Briefings
- Formal public hearings
- Interactive meetings.

This guidebook focuses primarily on the interactive meeting or workshop format. This type of meeting works best with a facilitator and is most useful to involve people fully in problem-solving or cooperative planning.

BRIEFING

Briefing:

- * Formal
- * Informational
- * Non-interactive

A briefing is a meeting held solely to provide information to a group of people without discussion or feedback. The only interaction might be a "question and answer" period. Since there is little discussion or participation, a facilitator may be unnecessary. This type of meeting provides information, but not two-way communication or involvement in problem-solving.

FORMAL PUBLIC HEARING

Public Hearing:

- * Formal
- * Non-interactive
- * May be adversarial

The formal hearing is a semi-judicial process which gives the public an opportunity to testify or comment formally "for the record" on a proposal before final action is taken by decision makers. The hearing is usually not a forum for dialogue and interaction. Hearings often take place late in the process after alternatives have been developed and evaluated. They serve as a formal last step in the process of public input.

Interactive Meeting

- * Informal
- * Participatory
- * Cooperative
- * Consensus-building

The conventional public hearing that uses a "speaker/audience" format tends to produce stilted, formal, one-way communication. It puts a premium on persuasion, aggressiveness, public speaking skills, determination, and technical competence as far as the audience is concerned. It limits the potential of the agency staff to serve as resource persons and facilitators.

The "Interactive Meeting" is a general term for any meeting in which there is dialogue and shared participation. It has become the most popular and productive type of meeting format for involving people in problem-solving and consensus development, especially early in the planning process. It encourages people to be open-minded, creative, and cooperative; to listen and learn as well as to speak.

It is a forum for exchanging information, asking questions, testing new ideas, and building potential solutions that are based on the best thinking and information available from all groups and individuals involved. Interactive meeting formats work equally well for meetings within an agency as for public meetings or meetings with other agencies.

There is a common fear within agencies that if a public meeting is open and interactive, the agency might lose control and be forced into positions or decisions not desirable, or the meeting may degenerate into chaos and confusion. These fears are unfounded if the meeting purpose is clear, the agenda carefully planned in the spirit of cooperation, and a facilitator is available to help the group through difficult moments.

INTERACTIVE FORMATS & AGENDAS

There are several characteristics of an interactive meeting that distinguish it from a briefing or formal public hearing.

- ☐ In an interactive meeting, the agenda is designed so that there is information sharing and discussion among all participants. There are a number of simple discussion methods for small or large groups, beginning on page 35. A sample agenda follows, on page 27. Facilitators should consider the discussion process that will work best for each meeting and plan it into the agenda.
- ☐ Participants are seated in an arrangement most conducive to group discussion and information sharing. If the meeting is small, this may be around a large table. If the meeting is large, it may be "workshop style," with participants sitting in small groups around many tables arranged so that everyone can see a central presentation area. If tables are not used and people are seated in chairs, the chairs should be arranged so that people are not sitting in rigid, straight rows. Alternative seating arrangements are illustrated on the next page.

RECORDING PARTICIPANT FEEDBACK

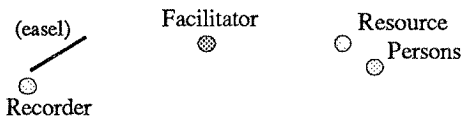
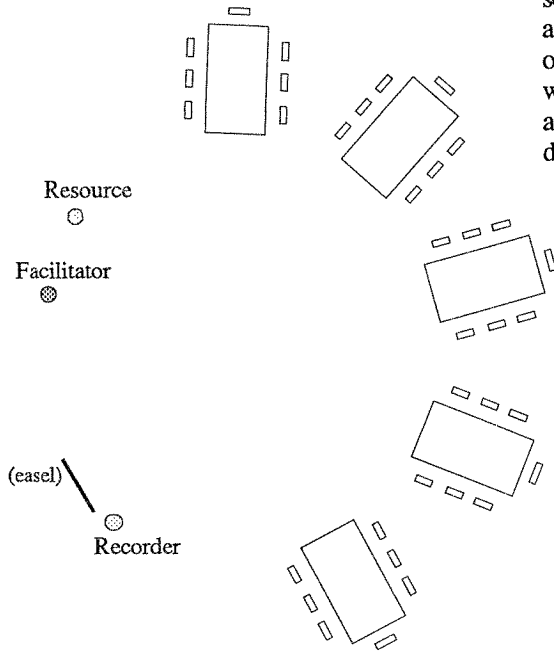
In planning the agenda, the methods for recording and documenting feedback should be identified. Trust increases when participants have an opportunity to provide feedback in both the group and individual form. A method for recording group discussion is described in the next section. In addition, it may be useful to provide participants a method for making written comments either through an open-ended comment form or through individual questionnaires. This assures people that individual concerns and ideas that may not get full attention in the discussion will be recorded and documented for consideration.

INTERACTIVE MEETING FORMATS

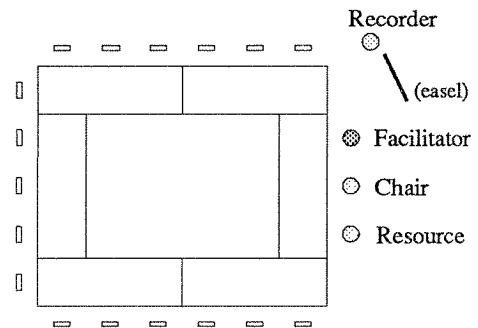
Try an arrangement that allows people to see each other and to work in groups. Avoid, when possible, the speaker-audience format in which participants sit in rows looking at each other's backs. Here are some suggestions.

Large Meeting Workshop Style

semi-circular arrangement of tables allows whole group and small group discussions



Small Meeting Workshop Style No tables, Semi-circular seating



Small Meeting Workshop Style Tables arranged into one large "round table"

Although each meeting is different, the following agenda items are common to many interactive meetings:

TYPICAL AGENDA:

- Welcome & introductions
- Review of meeting purpose and agenda
- Informal presentations
- Question and answer period
- Group discussion, brainstorming or problem-solving tasks
- Individual feedback (written comments)
- Summary and closing

SAMPLE AGENDA

MEETING SUMMARY: The facilitator's agenda should reflect both the topics for discussion and the methods to be used for group discussion and feedback. A simplified agenda can be used for participants, though this detailed form can be useful to everyone.

Date: May 21 Location: Community Center

Time: 2:30 pm Meeting Place: Central Hall

PURPOSE:

To evaluate and compare the four alternatives for the _____ study in order to use this information to develop a recommended plan.

DESIRED RESULTS:

- * A list of strengths and weaknesses of each alternative as perceived by meeting participants.
- * Awareness of level of support for each alternative and possibility of consensus; ideas to modify alternatives and increase acceptability.

PARTICIPANTS: Expect about 50-80 local residents and landowners.

AGENDA & FORMAT:

Minutes:	Agenda Topics:	Method:
3	Welcome & meeting purpose	Chairperson using chart
5	Agenda & groundrules	Facilitator using chart
5	Presentation: Background on the problem of _____	Project engineer using charts and slides
15	Presentation: The alternatives and how they were developed	Same as above
15	Questions & Answers	Facilitator & resource persons
30	Review of alternatives <ul style="list-style-type: none"> - Strengths of each altern. - Weakness of each altern. 	Facilitator leads a brainstorm to list major strengths and weaknesses
30	Alternative Preference <ul style="list-style-type: none"> - Which altern. have most potential for consensus? - Are there any ways to increase consensus? 	Open discussion led by the facilitator; recorder charts main points, facilitator summarizes
10	Individual Comment Forms	Written by participants
5	Summary & Closing	Chairperson & facilitator

Preparing Meeting Information

Often, before meaningful dialogue can occur, participants need to become better informed on the subject of the meeting. Before the meeting, they should be provided with any background information necessary to their ability to participate. This can be provided in materials mailed before the meeting or in the invitation itself. Often, though, this information is provided at the beginning of the meeting. A time may be set aside to present information orally and/or in written form.

How this is done can affect the entire meeting. Many facilitators have had to rescue participants from oral presentations that are boring, confused, poorly organized or too long. Making bad presentations is a form of meeting sabotage. Once people turn off and tune out during a presentation, it is difficult, sometimes impossible, to get everyone working together in a positive, energetic way.

"Studies of the listening process ...reveal that we comprehend only 30 percent of what we hear. The reason is that listening is so tiring. Most listeners are fully attentive only for the first few minutes of a presentation."

– Athos & Pascale
The Art of Japanese
Management

- ☐ **Be brief and concise.** Plan the presentation time for less than 20 minutes. After this, listening fatigue rises quickly. If more time is needed, break the presentation into two parts with discussion or questions in between. Allow as much (or more) discussion time as presentation time.
- ☐ **Edit, edit, edit.** Avoid being wordy and repetitive. Don't drown the information in unnecessary details. Avoid technical jargon.
- ☐ **Be objective and give the important facts.** Begin by making an outline of the facts people most need and want to know. Put yourself in the participants' shoes. Be careful not to manipulate people by slanting the information toward a particular point of view.
- ☐ **Use visual aids while talking.** These can range from simple facts written on chart paper to maps and wall charts, slides or an overhead projector. Be sure everything is clear and readable from a distance.
- ☐ **Do a "dry run."** Practice the presentation before a staff or a selected group. Ask people to play "devil's advocate" and ask the hard questions. This will help point out weaknesses and missing facts in your presentation.
- ☐ **Provide handouts of critical facts and information.** Participants may resent hearing a lot of oral information with nothing in their hands to help them remember the information and evaluate it throughout the meeting.

Selecting Meeting Groundrules

Groundrules are agreed-upon procedures for working together in a group. They establish trust by assuring a process that is fair and equitable to all. Groundrules usually set time limits and procedures for group discussion, participation, agenda items, resolving disputes, and so forth. The idea is to maximize each individual's contribution while sustaining the group's progress toward its goal.

Facilitators can suggest groundrules, but should always check with the group for concurrence and work out any objections or modifications. Be careful. Keep groundrules brief and simple. The groundrules should be perceived as friendly, practical and helpful, not "policing," or creating too much formality and rules.

SOME EXAMPLES:

ASKING QUESTIONS	"Please hold your questions during the presentation. After, we'll have a question-and-answer period of fifteen minutes. Because we have a large group, we will take only one question from each person until everyone has had a chance to ask a question."
SHARING DISCUSSION	"In order to share the discussion time, we ask that people limit their questions or comments to about one minute. After that, I will interrupt and ask you to finalize your question or comment, then I will move to someone else."
WRITTEN COMMENT	"If you have prepared written comments, we ask you to summarize these in your own words within the one-minute limit. We appreciate the time you have taken to prepare these. If you will leave a copy with us, we will include these in the record of the meeting."
MEETING RECORD	"As we talk, we will record each person's suggestions and ideas on the newsprint. Please stop me and point out if we miss anything."
BRAINSTORM	"During the 'brainstorm' to list all issues and concerns, there is to be no discussion or evaluation. We want to assure that everyone's concerns are listed before we discuss them."

... more, next page

MORE EXAMPLES:

DATA DISPUTES	"If there is any unresolvable disagreement over factual information, we will list the item in the group record and seek clarification after the meeting."
AGENDA	"If there are any issues or topics not on the agenda that the group would like to discuss, let's list them now. We will set aside the last half-hour of our meeting to address these."

These are only examples. There are no fixed formulas for groundrules. Groundrules are a way to get everyone in a group to agree on a process. When a group has been having serious issue disagreements, setting groundrules for discussion may be the first opportunity for members to agree on something. It helps build teamwork and cooperation.

Assigning Meeting Roles

A facilitator does not usually work alone. There are three other roles that are important for interactive meetings and group problem-solving:

- Chairperson
- Recorder
- Resource Person(s)

Each of these roles supports the facilitator and the group. In the essence of team spirit, they each contribute to helping the group function at its highest level of creativity. People serving in these roles should prepare themselves by clarifying their functions in the meeting.

If you are facilitating a small meeting, you may not need a person for each role. It may be more efficient to combine roles — the chairperson can also serve as a resource person; or if you have more than one resource person, one of them also could serve as recorder. When possible, though, it works best to keep these roles separate.

The Recorder

Traditionally, if there is any recording at meetings, it is done by a stenographer, by someone taking notes, or by tape recording. This provides a complete record or transcript of a meeting, but has no productive use during the meeting process itself. Another method of recording, which is done visually in front of a group, provides a powerful tool for making interactive meetings more effective. The technique is used by facilitators in all settings from staff meetings to public workshops. Used well, it improves trust, creativity, and a feeling of accomplishment among group members.

Recording visually on an easel or chart paper, in front of a group, is called "group memory" or group record. It allows everyone to see what is being recorded and to remember all comments or ideas as they accumulate. People can only hold a few ideas in their heads at one time.

ADVANTAGES OF THE "GROUP MEMORY"

- Focuses the group on a task
- Frees participants from taking notes
- Assures that all ideas are seen and remembered; gets ideas "on the table"
- Increases trust and sense of accomplishment
- Encourages participation from everyone
- Provides a written record of group discussion

A recorder can be anyone who can write quickly, in large, clear handwriting, while standing up, and who is familiar enough with the technical language of the meeting topic to keep up with the discussion. When possible, the facilitator should not serve as recorder. It's distracting for the facilitator to turn away from the group to record. The recorder and facilitator should work as a team.

Charting the Group Memory

Comments on Alternative A:

1. *Avoids impact to river canyon*
2. *More costly than other options*
3. *Need more information about*
4. ...

THE RECORDER'S ROLE:

- Be a neutral servant of the group.
- Use the words of the speaker in brief form.
- Catch the **key** ideas or phrases.
- Record feedback from group discussion, especially for listing:
 - problems, issues and concerns
 - goals, objectives, criteria
 - ideas for actions or solutions
 - evaluation of solutions
 - general comments, criticism, suggestions

THE RECORDER'S TOOLS:

- Marking pens
- Chart paper or butcher paper
- Easel or wall for hanging paper
- Masking tape or push pins

SUGGESTIONS FOR RECORDERS:

- Write quickly; don't worry about misspelling.
- Use large, clear handwriting.
- If challenged, listen and make appropriate changes.
- Concentrate and listen closely; tune out distractions from your task.
- Listen for key words, basic ideas; abbreviate words.
- Circle or underline key ideas, statements, or decisions.
- Vary colors; use stars, arrows, numbers to highlight/differentiate.
- Number all the sheets in sequence.
- If you fall behind, try these:
 - "Excuse me, is this what you said?"
 - "Wait a sec' 'til I catch up."
 - "Could you repeat that, please?"
- Keep a sense of humor.

The Chairperson

Every meeting needs a leader. Sometimes, for small, informal meetings, the facilitator can also serve as chairperson. For other meetings, it may be best to designate someone else in this official role.

THE CHAIRPERSON'S ROLE

- Represent the meeting host or hosts (BPA or the hosting agency, group, or community).
- Officially open and close the meeting.
- Moderate opening procedures – greetings, introductions, statement of purpose.
- Work with the facilitator or turn the meeting over to the facilitator and become an "observer," participate with the rest of the group, or serve as a resource person.

The Resource Person

The resource person is a technical expert or staff specialist available during the meeting to present and interpret information, answer questions, and listen to participant feedback. The best resource people are those who are directly knowledgeable about the project, program, or issues under discussion, can fully answer questions, and can provide detailed information. In large meetings on complex issues, it may be important to have several resource people with different expertise on hand to answer questions. In small meetings or in meetings of less complex problems, one resource person with general knowledge may be adequate. Sometimes the chairperson can fulfill this role if he/she is fully familiar with all the necessary information.

SUGGESTIONS FOR CHAIRPERSON & RESOURCE PERSON

- **Be brief.** Give messages and answer questions as quickly and concisely as possible. Don't give speeches. Don't repeat yourself.
- **Work with your facilitator.** Before the meeting, be sure you fully agree on the meeting purpose, the agenda, and the format. Chairpersons should be clear on when the meeting will be turned over to the facilitator.
- **Support your facilitator.** Don't be a back seat driver. If you tend to be assertive and talkative, try to talk less and listen more. Respect the suggestions made by the facilitator during the meeting. Be a good listener. Avoid becoming defensive or sarcastic, or getting into a debate with participants.
- **Be honest and straightforward** about your own position and interests. Don't try to be neutral if you are not. If there are positions that you have already taken, then share these honestly with the group. On the other hand, if you are responsible for being open to public input, then be open. Don't prejudge or take premature positions.
- **Show respect and patience** for all participants, even under attack. Separate the people from the problem. Avoid defensiveness.
- **Be accountable.** Let people know how their input at this meeting will be used in planning or decision-making and how you will report results back to them.

A good source for more information on planning and conducting meetings is *How To Make Meetings Work*, by Michael Doyle and David Strauss.

Facilitating Group Discussion Methods

The heart and soul of a meeting is the talk. Once this talk begins, the facilitator is fully alert and attentive to his/her primary reason for being there — to help the discussion stay focused and assure everyone's participation. Without any structure or direction to group discussion, participants might begin to talk about a problem in various ways. Some people may ask questions, others may give their perceptions on the causes of the problem, while others begin to expound on possible solutions. This kind of non-structured discussion can be rambling and confusing, focusing on both the problem and the solutions at the same time.

The facilitator's role is to provide the necessary structure to discussion so that it leads to the desired results. This means, at a minimum, stating a clear discussion question or task to the group. This may be enough direction for a good discussion.

Once a question or task is introduced, the discussion can be allowed to flow freely, with little structure or intervention by the facilitator, or it can be more closely channeled and guided by the use of methods like "brainstorming," to be sure that each voice is heard and all ideas expressed and understood in the time available.

In planning your meeting, you need to formulate the questions for discussion, decide how much time the group can spend on each question or task, and decide whether you want to use a specific discussion method. Following are descriptions of some simple and common techniques:

- Question and Answer Period
- Round Robin Feedback
- Brainstorming
- Group Weighting/Prioritizing
- Group Balance Sheet

"In order to gain the information and perspective that we need on a problem, we must stimulate the mind with questions. Rather than seeking to fix or avoid the ambiguity of the situation, we should seek to meet it head on and understand it."

— William Reed
Aikido
Instructor

Group Discussion Method:

Question and Answer Period

In meetings that begin with an informational presentation, it may be helpful to set aside a time right after the presentation strictly for answering questions before general discussion or feedback begins. This allows participants to clarify and interpret information and become better informed. It emphasizes the willingness of BPA and other resource persons to provide information fully and to increase understanding, which in turn builds trust.

In the agenda, set a time limit on this, since you want to emphasize that group discussion is to follow. You might assign ten or fifteen minutes for questions and answers. You can extend this time if you feel that more time is needed and that there are still too many unanswered questions. On the other hand, if meeting time is short, you can ask the group to move into discussion or whatever is next on the agenda, but remain willing to answer further questions as they arise throughout the meeting.

It helps to set a groundrule asking people to hold their comments and suggestions during a question period. Ask them to focus **just on clarifying information** or seeking additional facts that will help them understand the problem or issue under discussion. Be aware that sometimes it is hard for people to separate asking questions from making comments. See Part III for guidance on this dilemma during the meeting.

Group Discussion Method:

Round Robin Feedback

A "round robin" is a procedure in which you go around a table or a group and call upon each person to offer an opinion or to make a summary statement. In a large group, you can set a time limit on this for each person. The round robin is a structured way to ensure that each person has stated his/her concerns, or that each person has had a chance to make a suggestion or comment on a solution. It provides a time for people to summarize their feelings without discussion,

disagreement, or attack. It creates a time for everyone simply to listen to each other. An experienced facilitator may or may not plan for a round robin report in the agenda, but knows how to use this method when the time is right and when the technique will help each person to be heard.

For example: A group has been debating the merits of two alternative solutions to a problem. They have listened to each other discuss the strengths and weaknesses of each solution for some time, and many opinions have been offered. The facilitator would like the group to get a sense of where each member stands, without taking a vote or drawing final conclusions. The facilitator can stop the discussion and ask each person to reflect for one minute on which alternative might be the most acceptable and why. The facilitator then begins a round robin report from the group, person by person. This can be followed by more discussion, focused on what participants have learned by listening to each other in this way.

Group Discussion Method: **Brainstorming**

Brainstorming is one of the most popular, practical, and effective tools for group discussion. It works well with any size of group. Its purpose is to:

- ☐ generate and list a broad range of issues, ideas, goals, or alternatives in a short amount of time.
- ☐ involve all participants in developing the list.
- ☐ provide a time before open discussion in which everyone can contribute ideas or opinions without being attacked or getting sidetracked into debate over one idea or issue.

PROCEDURES FOR BRAINSTORMING

- Present a brainstorm question or task to the group.
- Set a time limit. Most brainstorms last about 10 to 20 minutes, depending on the question and number of participants.
- Select a **recorder** or use the one who is recording for your meeting. Ask the recorder to write each idea or comment as it is stated on chartpaper or a blackboard.
- Present the groundrules to participants (see next page).
- Begin the brainstorm. At first there may be some silence. Once the group warms up, ideas or issues flow quickly.
- Stop the brainstorm when the time limit is up or all ideas are listed.

Review the groundrules for brainstorming with all the participants. Display these on a sheet of chart paper or a blackboard. Be sure the brainstorm question is also clear to everyone.

PARTICIPANT GROUND RULES

- List ideas or comments from **everyone** in the group
- Work quickly within the time limit
- No discussion or judgmental comments
- Be creative – all ideas are acceptable – repetition is O.K.

Brainstorm

Group #3
ISSUES & CONCERNS

1. Crossing the river canyon
2. Disruption to farmland
3. Disagreement over need for project
4. Disturbance to recreation area
5. ...

The facilitator leads the brainstorm, calling on people and making sure their comments are recorded on the chartpaper or newsprint in front of the group. After the brainstorm, the group can select and discuss items on the list, talk about priorities, areas of agreement or disagreement, or whatever seems appropriate.

If you are working with a large group, say 25 - 30 people, you can break participants into small groups of about seven people each. Ask each group to select a recorder and provide them with markers and chartpaper. If your directions are clear, you do not need to prepare recorders ahead of time. Review the groundrules with everyone. Present the brainstorm question and ask each group to complete the brainstorm within the time limit. Then reconvene the whole group, and ask someone from each sub-group to report results back to the whole group. The chartpaper can be displayed on walls. This serves as the group record. Participants enjoy hearing the ideas or opinions generated in each sub-group.

The benefits of brainstorming are many. It is used in all kinds of meetings and situations, and is probably one of the most successful methods for decreasing hostility and fears that everyone will not be heard. Some benefits are:

- ☐ Everyone participates and contributes.
- ☐ It gets all issues or ideas on the table quickly, before discussion, in a non-judgmental way.
- ☐ It's visual – participants see each other's ideas and concerns.
- ☐ It builds trust.
- ☐ It relieves tension, anxiety over not being heard and assures that everyone's concerns/ideas are noted.
- ☐ It's creative – one idea can lead to another.

HOW TO USE THE BRAINSTORM

A. FOR SCOPING OF ISSUES & CONCERNS:

Ask participants to brainstorm and list all the issues and concerns that must be resolved around a problem or a proposed action. This helps the planners as well as the participants understand each other's interests. It's a great way to get all concerns on the table early in the process. This "airing of concerns" can relieve tension in a group and assure everyone a chance to be heard on the problem before developing solutions.

For example, you might ask: What are the issues and concerns that should be noted regarding the problem of _____?

B. FOR DEVELOPING IDEAS FOR SOLUTIONS:

Brainstorming is also a very effective and creative way to involve people in listing all possible solutions to problems or in developing criteria for evaluating solutions.

For example: After discussing the problem, ask the group to brainstorm:

- What ideas should we consider in developing alternative solutions?
- What are all the different steps we might take to achieve our goal?
- What are acceptable criteria for a solution?

C. FOR EVALUATING SOLUTIONS:

Brainstorming can be a first step in evaluating alternative solutions or proposed actions. It is a quick way to get reactions on the table before debate begins.

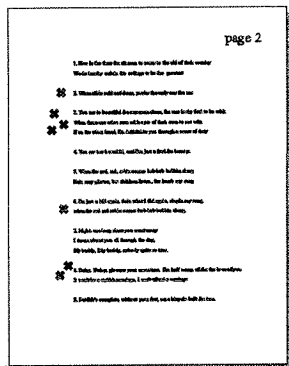
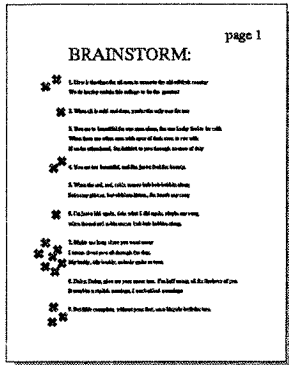
For example: Take one idea or alternative. Ask people to brainstorm and list the strengths and then list the weaknesses of the alternative. Be aware that what one person sees as a weakness another person may see as a strength. Note these differences and talk about them. Do this as a group for each proposed solution or action. Follow up with a discussion on which alternatives seem most acceptable or on how to modify alternatives to develop further agreement or consensus.

D. FOR MODIFYING SOLUTIONS:

Once again, the brainstorm can be used to get creative ideas out that can lead to agreement.

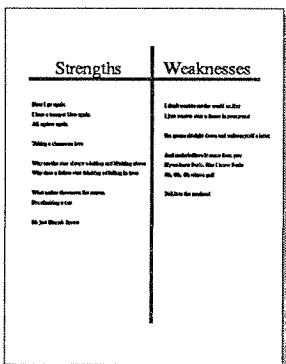
For example: You have two alternatives. Neither is fully acceptable to the group. Ask participants to brainstorm ideas on how to modify the alternatives and/or mitigate negative effects in order to create more acceptability. Don't let people argue these changes before they **list all ideas**. This can be a very creative moment, the time when real solutions begin to emerge, as people take responsibility for seeking ways to develop agreement. It also increases the participants' understanding of what doesn't work as a solution, and why it doesn't work. It increases understanding of what can be negotiated and what cannot. It assures that every possible way of building a win/win solution has been considered before arriving at a final decision.

Group Discussion Method: Weighting/Prioritizing



There is a fast and easy method for rank ordering or prioritizing a long list of ideas or concerns developed in a brainstorm. Let us say a group has brainstormed and listed fifteen issues that they think need attention in solving a problem. There is not enough time in this meeting to talk about all fifteen issues. The facilitator might display this list in front of the group and ask each person to put a check mark or a colored transfer "dot" in front of the five items that he/she thinks are most important. After each person has done this the list reveals a form of rank ordering. The most "dots" or checks indicate items that are of higher importance than items with fewer checks or "dots." The group might take the highest priority issues and spend the rest of the meeting talking about them. This voting procedure helps a group to rank-order a list quickly without the usual long discussions and debates such an exercise can entail. It leaves more time for actual discussion of the issues. (Asking each person to select five items is arbitrary. You can set the number at four or seven items; it doesn't matter, so long as everyone uses the same procedure.) This method will not give an exact rank order, from first to last, but will indicate clusters of items that are more important than others.

Group Balance Sheet



This is literally a sheet of chartpaper formatted to lead a group through an analysis of two sides of an issue or solution — pros and cons, strengths and weaknesses, conditions that will help or hinder an action, or potential gains and losses to parties that may occur over an action. It is an excellent group analysis tool and can lead to meaningful insight and new ideas for creating more acceptable solutions or actions.

Draw a line down the center of a sheet of chart paper or on a blackboard. Label the top of one column "strengths" and the other "weaknesses" (or whatever you are analyzing). Then lead the group in listing items on both sides. You can lead this exercise as a brainstorm, with no discussion of the items until they are all listed. This may help assure that all thoughts are listed in the time available.

This method will also help a group understand their areas of agreement and disagreement. Some participants may see a factor as a strength, while others see it as a weakness. Be sure to bring these out and talk about them. Remind the group that this is only a tool for discussion and is not to be used to take votes or make decisions unless the group is responsible for this.

IDEAS FOR GROUP DISCUSSION

Facilitating a good discussion means asking the right open-ended questions and eliciting participation. Here are some suggestions. Be creative and tailor these ideas to fit your own situation. Plan questions for discussion as part of the agenda.

MEETING PURPOSE

**Describe
and understand
the problem**

QUESTIONS FOR DISCUSSION:

- Who needs more information to understand the problem? What kind of information? What facts are important in understanding this problem?
- How do we each define the problem?
- Do we agree the problem should be resolved? How urgent is a solution? Why?
- Whom does this problem affect? How?

DISCUSSION METHODS:

Information Sharing: Hold an open question-and-answer or information-sharing period until everyone basically understands the problem situation.

Data Gaps: Record visibly any questions, requests for information, or data gaps that can't be resolved at the meeting and follow up later.

Round Robin: Go around the group (if it's small enough) and ask each person to reflect on his/her definition of the problem and level of support for resolving the problem. Record different responses on chart paper.

Group Problem Statement: Develop an objective "Problem Statement" as a group. Discuss areas of agreement and disagreement regarding the definition. Explore ways to redefine the problem to include different perspectives. The facilitator can paraphrase, clarify, and summarize. Try to come to agreement on a common definition.

Clarification: Separate "defining the problem" from listing related issues and concerns. Recognize that "agreement on the problem" does not mean support for any particular solution. It simply means having a common definition of the current dilemma, need, or issue under consideration.

IDEAS FOR GROUP DISCUSSION

MEETING PURPOSE

To identify individual issues, concerns, interests related to the problem

QUESTIONS FOR DISCUSSION:

- What are all the issues and concerns related to this problem?
- How does this situation affect each of us? Who else might be affected, either directly or indirectly? How?
- What are our mutual interests and what are our differences in interest?
- What potential conflicts may emerge? Why?

DISCUSSION METHODS:

Brainstorm: Using the rules of brainstorming, list everyone's issues, concerns, and interests that need to be recognized in developing alternative solutions.

Prioritize: After brainstorming, ask the group to indicate which issues or concerns are the most important.

Open Discussion: Raise questions and ask people to discuss their concerns more deeply (without using formal rules of brainstorming). Be sure that concerns and responses are recorded.

Balance Sheet: Discuss the potential gains and losses to each party in pursuing or rejecting cooperative solutions.

Round Robin: Go around the table and ask each person to state, briefly, his/her issues and concerns.

Summarize: After discussion, the facilitator can summarize the major points or issues to check for completion of this task.

MEETING PURPOSE

To develop objective criteria for solutions:

- environmental
- social
- economic
- engineering

QUESTIONS FOR DISCUSSION:

- Based on our interests, what criteria do we each have for an acceptable solution to this problem?
- How are our criteria similar or different? Are some criteria more important than others?
- Can we develop or find consensus on a set of criteria?

DISCUSSION METHODS:

Evaluate a Draft: Present a draft set of criteria for discussion and evaluation. Ask people to indicate which criteria they can support, which they can't, and reasons why. Ask for modifications that can lead to consensus.

Brainstorm & Discuss: Without a draft, brainstorm a list of suggested criteria. Discuss the list and seek areas of consensus. Record consensus agreement.

Group Rate or Rank: Develop a method to rate or rank criteria.

IDEAS FOR GROUP DISCUSSION

MEETING PURPOSE

To develop ideas for alternative solutions

QUESTIONS FOR DISCUSSION:

- What are all possible ways to solve this problem from everyone's point of view? How can we avoid or mitigate negative impacts?
- What are different actions or ideas that would contribute to solving this problem (or achieving a goal)?

DISCUSSION METHODS:

Brainstorm: Ask the group to list all ideas that would contribute to a solution. These can be total solutions or parts of solutions. Record ideas.

Creative Turnaround: Ask the group to list all ideas that would aggravate the problem or would lead to the reverse of what is desired. This unusual method can provide creative insights or confirmation of being on the right track.

Build on Ideas: If some ideas have already been developed, present these to the group. Then ask everyone to contribute additional ideas. Be sure to hold off evaluation during this stage. Evaluation will inhibit creative thinking.

MEETING PURPOSE

To evaluate, compare and modify solutions

QUESTIONS FOR DISCUSSION:

- How effective is each solution in solving the problem?
- What are the strengths and weaknesses of each solution?
- Can we decrease negative effects (weaknesses) and increase positive effects (strengths) of certain solutions to increase acceptability?
- Which solutions have the most potential for consensus among us? Can we further modify these solutions to build consensus?

DISCUSSION METHODS:

Brainstorm: List and discuss strengths and weaknesses of solutions. List ideas for mitigating negative effects and building more win/win solutions.

Open Discussion: Discuss ideas for modifying alternatives and building consensus.

Individual Evaluation: Provide a written comment sheet or questionnaire for evaluating each alternative. Discuss these as a group after participants fill them out. Or ask people to submit a written individual evaluation in addition to group discussion. Make time in the agenda for this.

Group Rate or Rank: Provide a way for participants to rate or rank alternatives according to criteria. Keep methods simple.

IDEAS FOR GROUP DISCUSSION

MEETING PURPOSE

To achieve consensus
or prepare for
decision-making

QUESTIONS FOR DISCUSSION:

- What appears to be the most acceptable solution to the group?
- If there is not consensus, can we modify a solution, or make trade-offs, to achieve consensus? Would you accept "X" part of a solution in return for "Y"? What other trade-offs would be workable?
- If consensus can't be achieved, how will the decisions be made?
- Has the process been fair, open and complete? Are we ready to make a decision? If not, what else needs attention?

DISCUSSION METHODS:

Open Discussion: Keep talking until the group agrees that all solutions are on the table and have been fully evaluated. Get agreement/acknowledgment from the group that the process is complete and that it is time to make a decision.

Round Robin: Propose a solution that seems to have the most support. Go around the group and ask each person if he/she can support it even if it is not his/her personal preference. For those who say no, clarify why not. Seek any last changes that may make this solution more acceptable.

Brainstorm: List all possible compromises or trade-offs, if consensus cannot be achieved.

Check for Consensus: If consensus is not there, use whatever method for decision-making that was agreed to at the beginning of the process. This may mean preparing majority/minority preferences to present to a set of decision-makers.

Provide a Record of Opinion: Be sure that all majority and minority opinions are fully reported to decision-makers. Check with the group to be sure that the group record and individual record reflects this. Ask the group to review reports of the process before they are submitted to decision-makers.

Use a Mediator: If final decisions are the responsibility of the group, and an impasse has been reached (inability to achieve agreement or consensus), you may wish to consider using a mediator. This role is similar to the facilitator, but the process is more intense and is focused on resolving an impasse.

Part III

Meeting Facilitation

The Functions and Practice Of the Facilitator

Part III will take you through the meeting process and describe the functions performed and practices used by the facilitator in a range of meeting situations. It will give you choices in responding to difficult situations and common dilemmas. There are no right or wrong ways to facilitate a meeting, but there are appropriate responses to specific situations.

When you first practice the role of facilitator, you may feel as insecure as a young actor or actress on opening night. Eventually, though, with experience, you will get it in your bones. It will become as natural and effortless as any well-acquired art.

Many things happen at once in meetings. Except for the agenda, you cannot possibly carry in a list of instructions for facilitation, because each meeting is different. But with a good agenda and preparation, and an understanding of the principles and practices described in this section, you will serve well in this role.

Your strength will come in your preparedness and in your flexibility and intuition, your ability to put the books and instructions aside and wade into the water. The key to flexibility and intuition is to have a good set of tools and practices within your awareness, instinctively choosing the right tool at the right time; to be able to move easily between your soft power – being open, receptive, gentle, encouraging – and your hard power – asserting leadership, catching the reins on a wild horse, moving with strength and swiftness. In time, you will develop an intuitive recognition of when to jump in and help a group wade through confusion or conflict, and when to practice non-interference, to sit back, waiting alertly for the group to clarify itself.

These things cannot be taught. But the tools and principles can. They will provide the knowledge to help you work in a confident and imaginative way.

"Remember, you're in a powerful position when you facilitate; you command the attention of the group. Don't abuse this power. You should become a lens through which the attention of the group becomes focused on the problem."

– Doyle & Strauss
How To Make
Meetings Work

Again, here is an overview of the essential functions of the facilitator. The following pages will provide more insight in how to apply these functions at various moments in a meeting.

The facilitator....

- Remains neutral and impartial.
- Moderates the flow of discussion.
- Clarifies information.
- Protects individuals and their ideas from attack.
- Helps people listen to each other and share discussion.
- Accepts emotion and feelings; helps channel hostility, resistance, competition into productive discussion.
- Keeps the group focused on a common task and avoids side-tracking.
- Helps avoid repetition.
- Paces (speeds up or slows down discussion).
- Assures all points of view are expressed and understood.
- Clarifies areas of agreement and disagreement.
- Summarizes and checks for completion of each agenda item.
- States and restates the progress of the meeting.
- Suggests alternative discussion methods if something is not working.
- Helps the group find win/win solutions or reach consensus or compromise as appropriate.
- Helps maintain a sense of humor.
- Deals with problem people such as interrupters, monopolizers, late-comers.
- Works with a recorder. Assures that all comments are recorded in some way.
- Brings meeting to closure.

Before the Meeting Begins

An aikido master once said, "before the struggle, the victory is mine." He was referring to the ability of the warrior to be completely prepared, to assume an attitude of success before the action begins, and to be fully present in the moment with no physical or mental distractions. When a meeting begins, the adept facilitator is prepared. Complete attention has been given to the many details of setting up the meeting room, arranging equipment and materials, reviewing the meeting process with team members, and taking a moment to relax, center, and envision a successful meeting.

*** ARRIVE EARLY.** Be sure there is early access to the meeting room. Allow time for unexpected problems. For example, if you are meeting in a school, you may have been told by the school office that the meeting room will be set up for you, only to arrive and find that tables and chairs are still stacked in a corner. Or you may have brought wall graphics, only to find there is no wall space available on which to display them.

*** PREPARE YOUR ROOM AND ALL YOUR MATERIALS CAREFULLY.** Attention to details is the mark of an expert. Ensure that participants will be comfortably seated, will be able to see and hear presenters clearly and are in an appropriate arrangement for group discussion. Test out all equipment, especially microphones if they are being used. When possible, avoid using microphones. They can get in the way of spontaneous interaction.

*** REVIEW THE AGENDA AND MEETING PROCESS WITH YOUR TEAM.** Have a "dry run" of presentations to work out any problems with content or visual aids. Make each person's assignment clear: how you will greet people, distribute informational materials, handle latecomers, and deal with other problems that may arise. This preparation will help to create smooth team work.

*** GIVE YOUR TEAM SUPPORT.** Put them at ease with your own attitude of relaxed concentration. Ask them to finish with preparations so that you and they can relax for a few minutes before people begin to arrive.

*** BEFORE THE MEETING BEGINS,** take a few minutes to relax, center yourself and let go of any anxieties or distractions that may affect your concentration on the meeting process. It is extremely important to stay relaxed, open and intuitive during the meeting, particularly if you are expecting difficult moments. You might use an exercise like the following:

Find a quiet hallway or room in which to stand or sit alone for a few minutes or go outside and take a brief walk. Do some light stretching to limber up and increase blood circulation. Next, sit or stand with your back straight but not rigid, both feet on the floor slightly apart, legs slightly bent at the knees (if standing), arms loose at your side or on your lap. Take a few long, deep breaths from your abdomen, slowly exhaling. Close your eyes. Breathe slowly and deeply, counting from 10 to 1, feeling more and more relaxed. Allow your body to relax completely, from your head to your toes, letting all tension flow out. Focus on each set of muscles in your body and release any tightness or tension: frowning forehead, tight jaws, pursed lips, rigid neck, clenched fists, tightness in the shoulders, back, abdomen, arms, or legs. It helps to tighten and then relax each place one at a time until you feel slack and loose.

In this relaxed state, center yourself by bringing forth a positive feeling of respect and support for yourself and all participants in the meeting. You might reaffirm your purpose as facilitator (see Part I), or you might envision a successful meeting, seeing people leaving the meeting feeling satisfied and productive. Find some way that works for you to create a feeling of confidence. Open your heart as well as your mind.

"To act like one is to be one."
– Lao Tzu

"Fake it 'til you make it."
– Anonymous

"I will act as if what I do makes a difference."
– William James

As Participants Arrive

Be aware that the level of trust, rapport, and cooperation among participants is affected the moment they walk into the meeting room by what they see, how they are greeted, and what interactions occur before the meeting begins. The ground has been prepared for a cooperative meeting in the meeting design and agenda and in the way participants have been invited. Now there is another opportunity to seed a cooperative spirit as people arrive. The sincere warmth and support you show to participants – a friendly nod, an expression of politeness, a helpful gesture – will come back to you ten times over in respect and cooperation during the meeting.

* **ESTABLISH RAPPORT.** Warmly greet people, and help them to find a seat or direct them to a coffee table, to displayed information, or to a resource person. Ask resource people to be available for informal discussion before the meeting begins. Let people know you appreciate them and their time.

* **HELP SET PEOPLE AT EASE.** It is alienating for people to enter a meeting room in cold silence and feel that no one really wants to be there or connect with them as a valuable human being. Don't hide in corners or suddenly busy yourself with meeting preparations, and don't let other team members do this. Break the ice. Use this time to help people get acquainted.

* **BE CASUAL AND SINCERE.** People can detect "phony friendly" anywhere. If you can't think of any way to draw people out, allow some silence. Someone else will probably start a conversation. If you are truly relaxed, others will relax around you. If you are not relaxed, don't be afraid to say so. When you are willing to be vulnerable and human, others will open up to you.

* **ASK FOR HELP.** If you are caught short of time and participants begin to arrive while you are still setting up the meeting, ask them to help you with chairs, materials, or whatever. Sometimes this involvement helps establish rapport and cooperation.

* **USE THIS TIME TO PROVIDE INFORMATION** to participants to increase their awareness of the issues being discussed at the meeting. You can even schedule an informal "open house" for half an hour or more before the meeting begins, during which people can look at maps, informational displays, and other materials or can talk one-on-one with technical or resource people. As facilitator, you can help direct people to the information or resource personnel.

"Action without preparation of the ground only frightens and repels."

– Wilhelm/Baynes
Book of Changes

Opening the Meeting

The opening words and interactions of the meeting leaders have a distinct effect on participants. They can help a meeting come alive or put it to sleep. They can set a tone of "we're here to listen and work together" or "we talk, you listen." These first moments are crucial in setting a tone of warmth, informality, mutual respect and meaningful dialogue.

* **AVOID SLOW OR WORDY INTRODUCTIONS OR WELCOMING MESSAGES,** which can be a clue to people that this meeting may drag on and become boring. If welcoming comments are being given by a VIP or chairperson, speak with them ahead of time and diplomatically ask them to be brief or agree on a time limit.

* **INTRODUCE YOURSELF.** Not everyone is familiar with the role of facilitator. Once you are introduced, take a moment to explain your role. You might say something like this, "I want to welcome you all. My name is _____. I am serving tonight as your facilitator. In this role I will not be contributing my own ideas or opinions. Rather, I am here to help us all focus on the task and

work smoothly together in the time we have. My job is to ensure that everyone has an opportunity to speak and be heard, to keep our discussion focused, and to see that all ideas and points of view are considered during this meeting. I ask you all to help me. If you think I am pushing too hard, let me know. If you correct me or anyone else on the meeting team, we will try not to be defensive. Working together, I know we will have a good meeting."

*** INTRODUCE OTHERS.** Quickly introduce the other meeting team members and explain their roles, or have them introduce themselves. Be sure people understand the role of the recorder. If you are providing a means for making written comments during the meeting, explain this.

*** GET THE PARTICIPANTS INVOLVED AS SOON AS POSSIBLE.** A good way to create rapport among participants is to ask them to introduce themselves. It gives people an immediate sense of who is at this meeting. This can work with as many as thirty or forty participants if it is facilitated quickly. You might say, "I'd like you to introduce yourselves. Let's go around the group quickly. Tell us your name and where you are from or what group you are representing this evening. Let's begin here." Then gesture toward the first person.

*** ASK PEOPLE TO LISTEN CAREFULLY TO EACH OTHER AND SHARE THE DISCUSSION TIME.** Emphasize that the meeting is an interactive working session, and that the outcome is everyone's responsibility.

*** IF THE MEETING IS LARGE** and people begin to take too much time by stating a position or opinion on the meeting topic, stop and remind them to state only their name and where they are from or what group they represent, in respect of time. This is where you begin your function of keeping people "on task" and helping them to move along. Assure them that there will be adequate time to state their opinions and concerns during the meeting.

*** IF THE MEETING IS SMALL** (under 20 people) you can invite participants briefly to state their concerns or areas of special interest that motivated them to attend the meeting. This is a good way to build awareness of each other and get interests identified before listening to technical presentations. People listen better once they have had a chance to speak and establish their presence in the group. Put a time limit on this, so that it doesn't become a discussion or a series of speeches. You might ask each person to take about ten seconds. Give them an example. "I'm Dave Jones from Prairie County and I own fifty acres near the location of the transmission line. I'm concerned about my property." Or, "I'm Susan Smith and I'm representing the local utility that is requesting additional power, and I'm here to listen and provide any information I can."

Setting the Agenda and Groundrules

Either the chairperson or the facilitator can present the agenda and groundrules for the meeting, although this is a good opportunity for the facilitator to establish his/her role with the group, even if the meeting is being run primarily by the chairperson.

*** MAKE THE AGENDA VISIBLE.** Write it out on an easel, chartpaper, or a blackboard, or distribute it on paper. Talk it through and briefly explain the purpose of each agenda item and the discussion format that will be used. Be specific about how much time there is for each agenda item or task. State and display any groundrules that you would like the group to adhere to during the meeting. Then you might ask, "Are there any comments or questions regarding the agenda or groundrules?"

*** ALLOW SILENCES.** Whenever you ask a question of the group like the one above, always pause for five to seven seconds. Don't get anxious when there is not an immediate response. Sometimes it takes a few seconds for people to hear you, think about it, and respond. If no one responds after this pause, you might say, "OK, if there are no comments, let's adopt the agenda and groundrules and begin." Again, pause just a few seconds and then, if there are still no comments, begin.

*** TAKE TIME TO RESPOND TO CONCERNS.** If your agenda planning has been sensitive to the needs of participants, you should get past this step rather quickly. On the other hand, if there are questions and concerns about the agenda, you need to take some time to sort these out. It will be difficult to complete the meeting if people are unhappy with the agenda. Listen carefully to their concerns and make reasonable adjustments. Or point out how the agenda does respond to their needs. If helpful, brainstorm and develop a list of topics or issues people want to discuss at some point. If these are not already included in the agenda, but are important to the group, suggest a way to include them. Brainstorming is also a good technique to build an agenda when there isn't one.

Facilitating Group Discussion

You are now ready to begin with the content of the meeting. You have already accomplished a great deal of your role as facilitator. You have set a cooperative tone in the way you and the meeting team have greeted participants, in the interaction with participants before the meeting, and in the way you conducted opening procedures. You have established a sense of fellowship and mutual cooperation, and given the group its first opportunity to come to agreement by seeking approval of the agenda. You have prepared the ground for the group to get down to work. What happens from here depends on the circumstances of your meeting.

The rest of this guidebook will describe the functions of the facilitator during group discussions, and suggest choices and strategies for handling different situations. But first, it may help you to see yourself in three distinct roles during each group discussion:

- A. OPENING agenda items or group discussions
- B. INTERVENING during discussion to call on people and assist the group
- C. BRINGING CLOSURE to each discussion or group task

"The difference between an authentic leader, making us aware of inarticulate needs and conflicts, and a power wielder is like the difference between a guide and a hard-sell advertiser."

– Marilyn Ferguson
The Aquarian
Conspiracy

A. OPENING DISCUSSION

Each agenda item or group task should be introduced clearly so that participants understand what they are expected to accomplish, how much time is allocated, and what groundrules apply. For example, after opening procedures you might say, "We will begin with a brief presentation to provide you with background information on the problem of _____. We have fifteen minutes for the presentation. In the interest of time, please hold your questions until after the presentation. You might write them down in order to remember them. Following the presentation, we will have a fifteen-minute period for answering questions on the presentation, then we will move into a discussion. OK, let's begin."

B. INTERVENING DURING DISCUSSION

Once participants begin to interact in a meeting, the facilitator carefully observes both the process and the content of discussion, and intervenes to call on people, to clarify information, or to make a suggestion that will help the group process to move along. If a group is working very well together, listening to each other,

cooperatively sharing discussion and staying focused on its task, the facilitator may hardly be noticeable during the discussion, standing by to intervene only if the group needs assistance. On the other hand, if there is tension or hostility in the group, competition for the floor, or confusion over the process, the facilitator may be intensely involved, like a traffic cop during rush hour, keeping the discussion from flying off in six directions at once.

There are many kinds of interventions which will be described in the remaining pages of this guidebook. Some are verbal interruptions in which the facilitator intervenes in the discussion in order to clarify a point or bring a discussion back on track. Some are simply non-verbal gestures or expressions.

Examples:

Someone has just made a controversial or surprising comment and the group starts to "buzz" in reaction. The facilitator intervenes by silently holding up his/her hands, palms facing outward, and waits for the group to quiet down and get back into listening, allowing people a moment to vent their feelings. If this doesn't work, the facilitator becomes more assertive and asks people to come back to order.

Two participants slide into an argument when one personally insults the other. One calls the other's position on an issue "stupid." The other responds by accusing his attacker of "standing in the way of progress." The facilitator quickly intervenes by interrupting the exchange, acknowledges the intensity of their feelings about the issue, and asks them to each state their own interests without attacking the other person. This satisfies their need to have their individual interests clarified and allows them to "let go" of their attack on each other.

Facilitators use a "graduated response" to situations where they must intervene to solve a problem. They first try a low-key suggestion, the minimum amount of intervention necessary to make an adjustment, like changing the trim tab on a ship to bring it back on course. If the problem persists, they use a more assertive approach. For example, if several participants begin to dominate the discussion, the facilitator may gently interrupt and ask people to share discussion time. If this doesn't work, the facilitator may set a groundrule that each person speak only once until everyone has had a chance to speak.

A good facilitator works so smoothly and respectfully that people do not feel they are being unduly interrupted, pushed, or manipulated. Interventions are made to enhance the group's ability to complete its task, not to take responsibility for the group. Too much intervention becomes interference and can be harmful to a group, while too little intervention when it is needed can leave a group stranded.

*"Since I started giving it away,
I never had so much authority."
— Paul Reeves, Foreman
Harmon Auto Parts*

C. BRINGING CLOSURE

Bringing closure means bringing an end or conclusion to a discussion, another important function of the facilitator. Without closure, a group may ramble on far too long, or fail to recognize that they have completed a task or achieved a goal. A discussion may be so interesting or intense that the group hesitates to conclude it and move on, yet time is running out; or out of politeness, participants are

"We have all witnessed a flow of organizational events building effectively toward closure only to see the over-eager clumsily destroy consensus with a premature plunge toward the finish line."
– Pascale & Athos
The Art of Japanese Management

unwilling to cut each other off and conclude a discussion that has gone too long. Having a facilitator to play this role can be a welcome relief. Bringing closure to discussion is an art in itself. It is more than simply ending or stopping the talk. When a discussion or a group task is near completion, the facilitator may do several things to help the group get ready for closure:

* **BE THE TIMEKEEPER.** Remind the group when time is getting short. If the discussion does not appear to be near an end, extend the time or set a time limit. This may focus people and speed up the discussion. Sometimes the most creative group work emerges under the pressure of closure.

* **SUMMARIZE THE DISCUSSION** so that the group can get a feeling for what they have and have not accomplished and to review the main points made so far in the discussion. This may include listing areas of agreement and disagreement. Point out any areas of discussion still needing attention.

* **SUGGEST A WAY FOR THE GROUP TO COME TO CLOSURE.** You might ask each member of the group to make a summary statement of his/her opinions, or you might focus the group on one or two issues or questions that still need attention, or you might summarize the discussion and ask people if they concur with your summary. Check to see if there is anything else needing attention.

* **BE AWARE THAT TIMING IS ALL IMPORTANT.** If you push too hard, you may cut the discussion off prematurely, before the best ideas are heard, all concerns are on the table, or potential elements of agreement have emerged. On the other hand, waiting too long to bring closure can cause group fatigue or allow an edgy but cooperative group to disintegrate into confusion or conflict.

The remaining pages of the guidebook will present each function of the facilitator during discussion and suggest responses to different situations

Remaining Neutral and Impartial

To be neutral and impartial is to not favor one above another, to be free from bias, preference, or prejudice. No one is entirely neutral. We all have values and beliefs that shape our attitudes and opinions. But facilitators, like mediators and sports referees, know how to be impartial when serving in this role. They commit themselves to a fair and open process, rather than to an outcome, and truly have no interest in influencing the results of the meeting.

* **NEVER DEFEND OR TAKE A POSITION ON AN ISSUE.** If someone asks you for your opinion, remind him/her of your role as facilitator and ask if someone else would like to speak to the issue at hand.

* **AVOID ANSWERING TECHNICAL QUESTIONS.** Boomerang questions back to participants or resource persons. Answering questions puts you in the role of "resource person" instead of facilitator. If someone should disagree with your answer, you are likely to be in a defensive position and may not appear neutral. On the other hand, if a "resource person" has given an answer that is unclear or confusing to participants, you can clarify the answer by paraphrasing or restating it in more simple terms. You are the interpreter, not the expert.

* **BE AWARE OF YOUR OWN BEHAVIOR AND BIASES.** There are numerous ways that a meeting leader can unintentionally manipulate the process. For example, unconsciously, you might tend to call on people who are more articulate and assertive, ignoring those who are shy or inarticulate. Or you might call on more men than women or more women than men. You might allow the resource people to talk too long at the expense of participants. Stop and ask yourself now and then if you are protecting everyone's interest in the meeting.

WHAT DOES THE MEDIATOR DO?

- Listens to both sides
- Asks questions to find out facts
- Helps both parties talk about possible solutions
- Does not take sides
- Does not place blame
- Combines information provided by each party into solutions upon which both sides may agree.

*From: Community Board
Center for Policy
and Training*

Interpreting & Clarifying Information

As everyone knows, information can become distorted, exaggerated, and misunderstood. Facilitators help interpret and clarify information being shared among participants or given by resource persons. They assist participants in building a clear understanding of the issues or problems being addressed and an awareness of each other's interests and concerns.

Oral presentations are typically made at the beginning of meetings as a way to provide all participants with a base of information needed for informed group discussion. Several problems typically occur. The presenters, if they've not done

their homework well, may either bore their audience with long and dry presentations or overwhelm them with technical and complex facts. Or the participants, as listeners, may become rude or impatient wanting to ask questions or get on with discussion. Facilitators must often intervene, diplomatically, to save the relationship between presenters and their audience.

*** SECURE AGREEMENT WITH A PRESENTER ON A TIME LIMIT.** Put this in the agenda or announce it to the group at the beginning of the presentation. This allows you to intervene legitimately a few minutes before the time is up and to ask presenters to conclude their remarks. Of course, the best remedy is prevention – a well-planned and rehearsed presentation.

*** CHECK WITH A GROUP FOR UNDERSTANDING.** Keep watching the group to see if they are following the speaker. You can usually tell by people's expressions if they are relaxed and receptive, or tense and confused. If you are not sure, stop now and then and check with them.

*** INTERVENE IF A PRESENTATION APPEARS TO BE CONFUSING OR TOO COMPLEX FOR PARTICIPANTS,** who may begin to ask a barrage of questions or to show irritation with the presenter. Stop the presenter and ask him/her to restate a confusing point, or you might try summarizing the information yourself. Ask the recorder to visibly chart the main points being made, if this seems helpful. Work assertively with poor presenters to help them be clear and concise. But be careful not to interrupt too much. You may appear to be dominating or controlling.

*** AVOID DEFENSIVENESS.** Ask people not to get defensive if they feel "snowed" by information. Conversely, ask speakers not to be defensive if the group doesn't understand them. Encourage participants to work together to clarify and interpret the important facts. Acknowledge that some issues are very technical or complex, but that by working together you can sort it all out.

*** ACKNOWLEDGE MISSING INFORMATION OR DATA GAPS.** Don't pretend that important information is not important. If participants ask for information that cannot be provided at the meeting, see if you can arrange to provide the information to them later. Don't underestimate people's intelligence and their need for complete information. A story illustrates this point: People arrived at a meeting to review the alternatives for extending an airport runway. The cost and engineering data was fully presented. When asked for noise impact data, participants were told those studies were incomplete, and only partial information was provided. This infuriated the participants, and half of them walked out of the meeting. Obviously, this meeting was held prematurely. Although the facilitator had warned the agency hosting the meeting, the warning went unheeded. After the walk-out, the people who remained in the meeting vented their frustration over the insensitivity of the planning team. They then settled down to negotiate a date for a second meeting in which they would receive the complete noise data in order to review the alternatives adequately. This is an extreme example, but facilitators often must mediate between participants' demands for more or better information and the ability of the host agency to provide this information.

* **PARAPHRASE AND ASK CLARIFYING QUESTIONS.** If a participant or resource person is not being understood or is having trouble articulating his or her thoughts, step in and help interpret by paraphrasing or restating the information, and/or by asking open-ended, probing questions. Some types of questions might be:

- * Who, what, when, where, how...specifically? (What, specifically, are you objecting to? How, specifically, will you be affected?)
- * What is the difference between...(one idea and another, a desired state and a current state, etc.)
- * Can you give us an example?
- * Do I understand you to say that...(paraphrase)
- * Why? (Why do you say this? Why is this a concern?)
- * Could you restate what you have said to be sure we understand you?

* **SEPARATE COMMENTS FROM QUESTIONS.** Participants will often make a comment or give their opinion disguised in the form of a question. For example, after hearing a solution to a problem that he finds unacceptable, a participant might react with, "Isn't this solution preposterous? Are you aware that many of us think it will cause more havoc with the local economic conditions of our area than taking no action at all?" It is obvious that this person wants to make a point. The astute facilitator would accept it as such. He or she might say, "I understand your question as a comment that you feel this action will cause more problems economically than it will solve, is this correct?" After the participant has had a chance to respond, the facilitator might check out the participant's assumption by asking, "Do others feel this way, also?" Or, if paraphrasing seems unnecessary, just say, "OK, thanks. I'll accept that as a comment." Then see that it gets recorded.

Moderating the Flow of Discussion

Throughout the meeting, the facilitator moderates the flow of discussion: speeds it up when it drags, slows it down when it rushes too fast to be thoughtful, deepens it when it becomes superficial, spreads it out among participants when it becomes concentrated among a few vocal participants.

* **TO SPEED UP THE DISCUSSION,** the facilitator can politely intervene and suggest a way to move more quickly. For example, a group has been discussing possible solutions to a problem. The discussion has gotten stuck on a debate over the accuracy of a statistic. As facilitator, you might say, "Let's stop here a minute. We have spent considerable time debating the accuracy of this statistic. Let's put it aside for now and seek some better information about it later. Let's move on. Since many people haven't spoken yet, I suggest you each limit your comments to about a minute and let's try to get to everyone in the next ten minutes and see what other ideas people have. Jane, you look like you were ready to say something..."

This intervention accomplished several things. It helped the group move on, sped up the discussion, and spread the discussion back out around the group by providing a temporary groundrule for finishing discussion.

*** TO SLOW DOWN DISCUSSION**, use a similar strategy. Slow down discussion when participants appear to be confused, feel pushed, or have not had a chance to speak. It can be impossible to bring about consensus or readiness for a "next step" if everyone isn't ready. In this case, stop the group from moving on and suggest a way to slow down, back up, or spend more time on a task.

For example: A group has discussed and defined a problem, shared their concerns about it and are now talking about possible solutions. Suddenly, in great frustration, someone objects to the whole discussion by saying that he doesn't think there is any problem in the first place, and the situation should be left alone. As facilitator, you might stop the discussion and give this person a chance to state his point of view. Then check to see if others feel the same way, or may have other concerns that were missed. If some do, then the discussion of the problem may have been too fast or superficial, not allowing deeper feelings to emerge. You may need to slow down and back up. Remember, it's hard to agree on a solution if there isn't agreement on the problem. The facilitator may need to help the group clarify what the problem is and who is and is not affected by it. What may be a problem for one may not be a problem for another. These are important distinctions that the facilitator takes time to clarify with the group.

*** HELP PARTICIPANTS SHARE DISCUSSION.** Because some people are more assertive than others, some participants can end up dominating the discussion. You can help in several ways. Keep calling on different people, reminding people to make their comments brief so others can speak. If this doesn't work, set a new groundrule. Limit comments to less than a minute, or try a "round robin." Wait until a very talkative participant has been fully heard and you can sense the group is impatient, then interrupt and ask him to summarize and allow someone else to speak. Gently call on the silent ones, asking if they would like to add anything to the discussion.

*** ALLOW SILENCES AND MOMENTS OF NON-ACTION.** In our Western culture, there is a tendency to fill up silence, to push on and keep moving. People feel awkward or uncomfortable with a pause in the conversation. In Eastern cultures, moments of silence, or of non-action, are highly valued. It provides a time to stop and allow the mind to absorb and reflect. Facilitators are aware of what we call "timing," the awareness of when to plunge ahead or when to pause, to push to clarify a point, or to be comfortable for a moment with ambiguity or vagueness, to push for closure or to stay in the discussion.

*** AVOID SIDETRACKING.** It is easy for a group to focus on a single point, especially if it is controversial, and to get sidetracked into a discussion about this one point, forgetting the bigger picture. When this happens, bring the group back on course. You might say, "I appreciate your thoughts on a better place to hold the next meeting. You've made some good points that we'll consider. But we haven't finished our discussion on the issue of _____. Let's get back to it. Bill, you had your hand up some time ago..."

"When new ideas or facts come along, however compelling they may be, it is felt that people need time to let go gradually of the old before they can accept the new. Despite pressures and intensity, acceptance time is built into the Matsushita way of doing business."

– Pascale & Athos
The Art of Japanese
Management

Listening & Helping Participants to Listen

QUOTES & NOTES

Being a good listener is a mark of great leaders and devoted friends. Genuine listening puts the listener completely outside himself or herself and fully with the person being listened to. Good listeners are calm and receptive, giving unbroken concentration to the speaker. Attentive listening is inhibited when the listener is busy judging and evaluating what is being said and mentally preparing a response or rebuttal. This "listening to respond" can limit and distort what is being heard, putting both people in a defensive posture. Facilitators help people listen to each other by modeling good listening themselves.

"It takes a golden ear to be empty enough of itself to hear clearly."

— M. C. Richards
Centering

* **GIVE MESSAGES THAT YOU ARE LISTENING.** Let the other person know that "I'm with you" by saying so. Use a neutral word like "OK" or "go on," or simply nod your head, showing full attention.

* **CHECK TO SEE IF YOU HAVE UNDERSTOOD THE SPEAKER'S MESSAGE.** Restate or paraphrase what the person has said. This has several positive results. It gives you a chance to check out any wrong assumptions or interpretations; it reassures speakers that you have fully heard and understood them; it helps speakers clarify their thoughts by hearing their ideas in your words; and it encourages deepening the original thought instead of introducing new information or changing the subject. It gives you time to think clearly about what you are going to do or say next. By paraphrasing, the facilitator helps people explore their own ideas instead of giving advice or answers.

* **ON THE OTHER HAND, DON'T PARAPHRASE EVERYTHING SAID.** You might sound like a parrot. Sometimes a simple, heartfelt reflection of what someone else is feeling is enough. After listening to a long emotional outburst of anger, an empathetic listener might heave a sigh and say, "Wow, this IS a tough situation." Remember, it is not the technique of paraphrasing that makes this work, but your honest attempt to be fully with another person and to let them know you can see and feel things from their point of view. Remember that paraphrasing, or restating what a person says, does not mean that you agree with the person, but that you fully hear what they are saying or acknowledge what they are feeling.

* **ASK CLARIFYING QUESTIONS.** If you are confused or unclear about what the speaker is saying, ask a question. This gives the speaker another chance to clarify his/her thinking. It also shows your serious intent to listen and understand.

* **BE AN INTERPRETER.** Listen for the essence of the speaker's ideas. Help make ideas clear and concrete. An articulate facilitator can help a person who stumbles and rambles to communicate ideas concisely. Restate the essence of what you hear and ask the speaker to confirm that this is accurate. Then see that the idea is recorded if you are working with a recorder. Not everyone can speak articulately. People appreciate a facilitator who can help them say what they want to say, without putting words into their mouth.

Summarizing and Stating the Progress of the Meeting

The facilitator serves as a mirror for the group, reflecting back to participants how they are doing and what they have accomplished, by periodically summarizing the main points of discussion and by stating and restating the progress of the meeting. It is often difficult, in the heat of discussion and problem-solving, for individuals to keep track of what has been said and what it adds up to. The facilitator can provide this objective perspective, serving as a voice for the group as a whole.

*** SUMMARIZE PERIODICALLY.** Use the group record to point out items as you summarize. Check with the group to see if your summary is accurate.

Helpful times to summarize are:

- After a presentation of information to list main points.
- After discussing issues and concerns to acknowledge different and similar interests among participants.
- After an evaluation of alternatives to restate the major pros and cons, strengths and weaknesses or preferences.
- After discussion of an issue, to clarify the areas of agreement and state the remaining areas of disagreement.
- To refocus a group that gets off track.

"A problem-solving meeting is a meeting to attack a problem but not necessarily make a decision. A decision-making meeting is one in which there is pressure to make a final decision by choosing from previously developed alternatives."

– Doyle & Strauss
How to Make
Meetings Work

To summarize, you might say, "OK, let's stop here a moment and see where we are. This has been a good discussion, but there may be a few more ideas we haven't heard yet. What I have heard so far is..." (summarize the main points). "I have also heard that there are a number of concerns which include..." (summarize the different concerns). "Are there any other ideas or concerns we should note before we move on?" If there are additional concerns, continue to facilitate the discussion, then summarize again when you bring final closure to this discussion.

*** STATE THE PROGRESS OF THE MEETING.** This is a time to pause in the meeting and reflect on what has been accomplished. It can be used to infuse a group with new energy, by helping them to see that they are actually making progress and encouraging them to continue in a cooperative mode, especially when the meeting becomes tense or difficult.

For example: A group of landowners are meeting with BPA to discuss ways to resolve the impact of a transmission line route through their community. Participants are feeling increasingly anxious, suspicious that several of the new ideas mentioned are being too quickly dismissed by the project engineer. Accusatory remarks are made, and people start grumbling in side conversations. The facilitator steps in and says, "This is a very difficult time for everyone. Some of you have made some new suggestions, and may be feeling anxious that they will not be seriously considered. Let's stop and see where we are. You have reviewed the problem and most of you seem to agree that there is a need to provide additional power to this area. Some of you object, though, to the visual impact of the transmission line through your community. I have heard two

suggestions for solving this problem. One is..." (summarize it). "And the other is..." (summarize it). "Is this correct?" (Pause and wait for any response). "Let's stop and take a few minutes to brainstorm and list any other ideas from the group that should be considered, then let's list and discuss the advantages and disadvantages of each idea from your different perspectives. I'll see that this all gets recorded as we talk. We can't make any decisions at this meeting, but we can develop these ideas, and any others, and present them for consideration to BPA as a result of this meeting."

At this crucial time, when discussion became confusing and antagonistic, the facilitator stepped in to summarize, state the progress of the meeting, and suggest a way to continue the discussion productively by focusing on analysis of the new ideas.

Suggesting Changes in the Discussion or Agenda

Even well-planned meetings don't always go according to plan. Unexpected conditions or needs of the group may require an on-the-spot change in the agenda or a different approach to a discussion. The astute facilitator responds to these problems as they arise.

* **BE FLEXIBLE.** Show your willingness to make appropriate changes or adjustments. For example, another scenario for the meeting described above would demonstrate how facilitators must be open and flexible at every moment. Suppose that after the facilitator suggests that the landowners group continue to discuss the ideas for resolving the transmission line impact, a participant objects and says that she refuses to discuss *any* ideas until she is assured that BPA will do something about them. Other participants chime in with agreement. This may be a signal that there is growing distrust in the group about follow-through with the meeting results. The facilitator should check with the group to see if they need some time to discuss and address these concerns before continuing with the meeting agenda.

* **CONSIDER HOW TO ADJUST THE AGENDA AND STILL ACCOMPLISH THE PURPOSE OF YOUR MEETING.** For example, you may have an elaborately planned process for reviewing six alternatives to a proposal only to discover that many participants don't understand the problem in the first place and need more time to discuss it, or that most people want to focus on a certain issue and feel that comparing a complex list of alternatives is a premature exercise. If you adjust the agenda and provide more discussion on the problem, or give people some time to focus on a single, important issue, you may be able then to complete the original task of comparing alternatives, or you may decide to table this task for this meeting. Your best guide as to when and how to make these changes is your intuition and common sense.

Accepting Emotion and Dealing with Resistance

Transforming hostility and resistance into productive discussion and problem-solving is the mark of a master facilitator or leader of any kind. It can mean the difference between confrontation and cooperation, between a win-lose or a win-win outcome, between alienation or reconciliation.

To resist is "to strive against...for the purpose of stopping, preventing, or defeating." Resistance, be it between friends, co-workers, or political factions, can cause or be a symptom of conflict. We resist when something or someone threatens our well-being, our self-image, or our control over our own lives.

In a meeting, resistance is a self-protection mechanism that wears many masks. It can appear as cold indifference or stony silence--a refusal to participate, to disclose feelings or opinions, a withholding of information--or it can erupt as passionate anger, scathing criticism, or personal attack. In meetings, resistance that is based on fear, mistrust, lack of information, or feelings of powerlessness, as opposed to an honest difference of opinion, can block cooperative problem-solving and divert it into adversarial tactics or avoidance of issues.

Perhaps one of the most important jobs of the facilitator is to help a group deal with these destructive forms of resistance, and to protect everyone in the meeting from personal attack. The facilitator uses three principles to respond to resistance:

- Learn to recognize the resistance.
- Accept and acknowledge it.
- Suggest a way to reduce or address it.

A. RECOGNIZE RESISTANCE

You must be conscious of a certain behavior, in yourself as well as in others, before you can consciously affect it. Resistance ranges from a subtle wariness to an outright refusal to cooperate. It is a stiffening up, a closing down, a shutting out. Resistance can inhibit open and receptive listening. It can take the form of blaming, criticizing, attacking, or avoiding. It can come from an individual or from an entire group.

One can often see and feel resistance before any words are said. People walk into a meeting room looking serious, frowning, avoiding eye contact, talking secretly among themselves, or grumbling. Greeted warmly by the facilitator, the response is barely a recognition, more a calculated cold shoulder. This is resistance. Sometimes resistance comes unannounced. Someone enters the meeting smiling and friendly, but once into the discussion launches a bitter attack upon the chairperson, the facilitator or another participant.

Resistance, like conflict, is neither good nor bad. It is simply a message, an indication, that something needs attention. It is the response to resistance that can escalate it into further polarization or use it to understand better the problem and the person from whom it comes.

"When people get together, their need to be accepted as people is more important to them than their fixed positions. When people get to know one another as their names, faces, and histories rather than as proponents of viewpoints, they communicate their humanity."

– Robert Redford
Harvard Business
Review

B. ACCEPT AND ACKNOWLEDGE THE RESISTANCE

Most people make the mistake of reacting to resistance by becoming defensive or resistant themselves, by fighting back or closing up. This only causes the other person to dig-in his/her heels and take an even more resistant stand, to become more

argumentative, to attack with more hostility, or to become even more withdrawn and uncommunicative.

The first step in dealing with resistance, be it an attack or a refusal to communicate, is to accept and acknowledge it in a completely non-judgmental way, and to do this with complete sincerity. In other words, don't push back, don't fight the resistance by putting up your own, by arguing or defending. What the other person needs is acceptance and recognition of his or her concerns often hidden behind the resistance.

*"Be the water, not the rock."
– An old saying*

Since we have control only over our own behavior, facilitators, like any effective communicator, regard resistance as their problem, not the other person's. They accept full responsibility for finding a way to get past the resistance, rather than waiting for the other person to change. They remain calm and receptive, allowing themselves to see and feel the resistance from the other person's point of view.

It is often a great relief to a person to have his/her feelings and emotions acknowledged. Sometimes this is all it takes to turn resistance into cooperation. You acknowledge resistance by accepting the feelings and concerns that create the resistance, without judging the other person. By listening and observing with an open mind, the facilitator begins to discern the reasons for the resistance and uses this awareness to find a way through it.

* **LISTEN OPENLY.** In an attack, don't react or interrupt the person until he has had a chance to express himself fully. Accept an attack in a non-defensive way by acknowledging the other's feelings of anger, fear, discomfort, confusion, or frustration. Express back to a person what you think he is feeling or saying. It may be enough simply to thank the person for expressing his feelings honestly with the group. Or you might say something like, "It's clear to me that you are quite upset about this proposal and you want more information. Let's be sure we list the information you are requesting." (Checks with recorder.)

* **ALLOW VENTING TIME.** If resistance is coming from the whole group, allow participants some time to vent their feelings and concerns. Simply listen and accept each comment, or try a brainstorm or round robin to list all the concerns or feelings.

* **ASK THE GROUP FOR HELP.** If resistance comes in the form of silence or apathy, a non-responsiveness to discussion or interaction, don't be afraid to explore this with the group. Acknowledge your frustration with the lack of discussion and ask for help. Perhaps people feel that the meeting is a waste of time but are too polite to say so. Perhaps there are hidden animosities or the participants are simply shy. You can't address the problem until you identify it, and people feel safe to speak honestly.

* **WATCH YOUR OWN REACTION.** Control yourself, not others. Stay calm

and centered. Don't move too quickly to smooth things over or repress heated emotions. Allow circumstances to clarify themselves. Become comfortable with being uncomfortable during periods of difficulty. Remember that once people are free from the burden of unexpressed emotions, they are more likely to get down to the substantive issues.

*** SEPARATE THE PEOPLE FROM THE PROBLEM.** Ask people to attack the problem, not each other. Help them by recasting an attack on yourself or on another participant as an attack on the problem. For example, "When you say that Mr. Smith doesn't care about the disruption to your farming operation by construction of power lines, I understand your concern about others not experiencing this problem as directly as you are. What can we do to avoid this disruption?"

*** ASK QUESTIONS RATHER THAN MAKE STATEMENTS.** Statements can generate more resistance while questions can lead people into more open discussion. For example, someone may say, "If you push this proposal through, you're going to have this entire community down your backs!" If the facilitator, or a resource person, responds with, "I disagree. Several leaders in this community have requested this action," then a premature debate may emerge over the proposal. In a non-defensive response you might say, "Whatever action is taken, we hope it is in the best interest of everyone. How do you suggest we proceed?" Or you might ask, "Do others here feel the same way?"

*"First of all," he said, if you
can learn a simple trick, Scout,
you'll get along a lot better
with all kinds of folks. You
never really understand a person
until you consider things from
his point of view...."*

"Sir?"

*"...until you climb into his
skin and walk around in it."*

*– Harper Lee
To Kill a
Mockingbird*

C. POSSIBLE WAYS TO REDUCE RESISTANCE

The suggestions above are actually the first steps in reducing resistance. Once you have accepted and acknowledged the resistance, you may have reduced it enough to continue on, or you may need to build in some of the following responses. You need to determine the cause of the resistance in order to address it. Keep in mind that your goal is to keep people talking with each other and cooperating in the task of the meeting. Reducing resistance does not mean changing someone's opinion, it means honoring their point of view and creating a safe environment in which they can fully participate. Some causes of resistance and possible responses are:

*** LACK OF, OR POOR INFORMATION.** Discuss with the group or individual how they might become better informed or find access to necessary information. If they are not confident about information, discuss how it can be verified. During the meeting, take a break to allow more one-on-one discussion and information sharing, or encourage people to look at maps or review information. Pinpoint the information that is questioned and ask resource people to address these in more detail. If the information can not be provided at the meeting, talk about ways to provide the information later.

*** MISTRUST OF THE PROCESS.** Hold a discussion to review the procedures for the meeting or the decision-making process in general. Talk about groundrules. Determine areas where trust can be strengthened, such as ways to assure that the meeting results will be reported to and considered by decision-makers; or additional dialogue can take place after the meeting. Ask participants to offer ideas. Brainstorm how the process can be improved.

* **FEELINGS OF POWERLESSNESS.** Address people's fears of not being heard or not being able to influence the outcome of the meeting or the process. Record their concerns visibly and help assure them that, as facilitator, you will be responsible for seeing that their opinions are recorded and shared. Help them explore other ways to be effectively involved.

Remember, if the resistance is based on differences of opinion, but people are willing to work together in the meeting, then you really don't have a problem. This is healthy disagreement and the reason for working together. Simply continue with your meeting process.

Maintaining a Sense of Humor

A sense of humor can facilitate communication by lessening anxiety and creating rapport, a shared moment of lightness or laughter. It can help a group transcend feelings of separation or alienation, and rise above itself. We all need to laugh at ourselves now and then, to relieve our stress and our tendency to the over-serious. It is not appropriate to use mean-spirited or sarcastic humor in a group, but gentle, uplifting humor can be healing. If you are comfortable telling a joke or a funny story now and then, and have a good sense of when this is appropriate, by all means bring in a little humor. If you're not comfortable, then don't. Simply maintain your own sense of humor and let yourself laugh with the group when something funny happens. There are often many comedians in a group who will help release this sense of humor.

Helping a Group Find Win-Win Solutions

By now, if you have been absorbing this guidebook or have worked in teams or groups, you have become acutely aware that the process of solving a problem or resolving a conflict is most successful when everyone works together to find creative, win-win solutions. It can be a slow process, requiring as much focus on the problem as on solutions. A win-win solution is one which leaves all parties satisfied; one which does not harm or diminish any party, in which someone does not have to lose something in order for another party to gain something, or in which the losses and gains are shared.

Facilitators, as impartial third parties, are in a unique position to help groups seek and explore win-win solutions, or solutions of mutual gain. There are a number of ways to facilitate this:

* **FOCUS ON INTERESTS, NOT POSITIONS.** Be sure the members of a group understand each others' interests and ask them to avoid taking premature positions. Positions can obscure the real interests behind them.

For example: Elderly residents in a community may take a position opposed to development of a park in their neighborhood, but their interest is the maintenance

"To sum up, in contrast to positional bargaining, the principled negotiation method of focusing on basic interests, mutually satisfying options, and fair standards typically results in a wise agreement. The method permits you to reach a gradual consensus on a joint decision efficiently without all the transactional costs of digging in to positions only to have to dig yourself out of them."

– Fisher and Ury
Getting To Yes

"Individuals who are repeatedly persuasive in meetings are rarely those who come armed with prepared speeches. Rather, they are individuals who can see other points of view and create compromises or new solutions, who can hold their views in suspension while permitting themselves to remain a part of the process--then intervene at the right point to guide the discussion to shore."

– Pascale & Athos
The Art of Japanese Management

of a quiet, peaceful neighborhood. They object to the park because they fear it may become a noisy nuisance, overused by children, not because they dislike parks. If their interest can be met – the assurance that children's play equipment will be contained and buffered, and quiet green space will be provided with paths and benches – then their position on the park bond vote may change.

*** WORK TO RECONCILE INTERESTS, NOT POSITIONS.** Help group members to find ways to state their interests to each other, and then explore solutions that try to satisfy these interests through creative problem-solving, planning, designing, and impact mitigation. Use brainstorming to generate ideas for solutions.

*** INVENT OPTIONS FOR MUTUAL GAIN.** This can be one of the most creative and satisfying steps in the process of group problem-solving. After the problem has been thoroughly explored, and interests have been identified, participants can work to develop ideas or alternatives for win-win solutions. Brainstorming is an effective technique for creative thinking. Ask a group to list every possible way they can think of to satisfy each other's interests and solve the problem. Break the group down into sub-groups of five to seven people and ask each one to be a "thinktank," bringing their ideas back to the whole group for discussion. Ask technical specialists or resource persons to create and offer ideas.

*** BROADEN THE OPTIONS.** An obstacle to creative thinking is the tendency to limit the alternatives, to search for the single answer. There may be a fear that the more ideas a group or an agency must consider, the more confusing or unmanageable may be the process. This attitude may prematurely inhibit creative or unusual ideas that can lead to resolving troublesome impacts or obstacles to agreement. The remedy to this is to encourage a group to become inventive, to think of and list as many different ways to solve a problem as possible, even if some of the ideas sound crazy. Ideas can always be eliminated; they don't have to be pursued with equal attention. But this free-flowing type of brainstorming can produce creative insight, can ignite imagination, and can often lead to very sound solutions not previously considered.

A good reference for these ideas is the paperback, *Getting To Yes*, by Roger Fisher and William Ury of the Harvard Negotiation Project.

Working with Problem People

Inevitably, there will be a few participants in a meeting who can make the discussion difficult for everyone. The facilitator must find the delicate balance between protecting the group from disruption of individuals and protecting individuals from being overwhelmed by the group. When a participant becomes a problem, the facilitator uses the principles for dealing with resistance – accept what the person is doing, don't ignore it; let the person know that you have heard him/her correctly; then make a suggestion to deal with the concern or to defer it until later. Always begin with a low-key approach. If it doesn't work, escalate your intervention, saving direct confrontation as a last resort. This "graduated response" is a good approach to dealing with any difficult situation.

Here are some problem people and possible responses:

* **THE MONOPOLIZER:** This is a person who talks too much. Interrupt and suggest that the person summarize and allow someone else to speak, in respect of time. Do this a second time if needed, to get the point across. If this doesn't work, be direct and remind him that he has had several chances to speak, and you would like him to share discussion. Refuse to call on him for awhile. If there are a number of monopolizers in the group, set a new groundrule. You might say, "I know everyone has a lot to say, but some of you are taking more time than others. For the next 15 minutes, I suggest each person speak only once until everyone who wants to speak has spoken, then we will drop the groundrule." During a break, speak with the monopolizer. As a last resort, wait until you sense that participants are on your side (tired of the monopolizer), then confront him in the group. You might say, "Hold on John, you're not giving other people a chance to talk. I'd like to check this with the group. Do others feel the same way?" Save this approach for last, since it is the most threatening.

* **THE EXPERT:** This person always has the answer. Trying to be helpful or be noticed, she keeps others out. Interrupt her tactfully and direct a question to someone else. Let her know you appreciate her. Suggest, "Let's get several opinions."

* **LONG-AND-WINDY:** Similar to the monopolizer, this person may take off into a monologue. When he stops for a breath, cut in and thank him, restate his central point (if you can), and say, "We've got to keep the discussion moving." Then pass on to someone else.

* **ARGUER:** This person may argue a point incessantly as a tactic to disrupt the meeting. If highly emotional, she may viciously attack other participants or presenters. Move in close to her, maintaining eye contact. Sometimes your physical presence will help de-escalate his attack. Recognize her concern or answer her question, and side with him when possible. Then shift the focus to another participant. If she persists, ask her to meet with you or a resource person during the break, to try to work out the concern. Wait until you sense that the group is on your side, then ignore her. Sometimes the group will respond and ask an arguer or monopolizer to be quiet or leave.

* **EARLY LEAVERS:** When the meeting begins, stress the importance of participating in the entire meeting. Get a commitment. Check to see if everyone can stay until the end.

* **WHISPERERS:** If you can, walk over and stand near people engaged in side conversations. This subtle intervention will often get their attention. If not, say, "Excuse me, but we all need to stay together in the discussion. It's distracting to the group if some people are talking." Then move right on.

* **REPEATERS:** If someone continually makes the same point, point out that you have his/her idea or concern recorded in the group record, and move on.

* **STONEWALL:** This person refuses to join the discussion, to provide any

information to the group or to indicate agreement or disagreement. You can't force participation. Find his interests. Call on him for advice and slowly draw him out. Tell him the group would benefit from his experience or opinion.

There may be many other difficult situations or types of problem people, but these ideas should help you develop your own strategies for dealing with each situation. Be honest, direct, polite, patient, and assertive. The group will pick up from you that your intentions are to protect the meeting process, and will often assist you in solving problems.

Closing the Meeting

How you close a meeting is as important as how you opened it. It can set a lasting impression about the success of the meeting. It can provide the transition to "next steps" or follow-up, and it can help bring perspective to what was and was not accomplished in the meeting.

*** CLEARLY STATE WHEN IT IS TIME TO BRING CLOSURE TO THE MEETING.** If discussion has been intense and vociferous, call people to order and wait until everyone is silent, allowing an emotional cooling down period and readiness for closure. Remember, don't surprise people by suddenly concluding the meeting in the middle of a hot debate or discussion. Give them ample warning that discussion time is almost over and help them reach closure on their last agenda item before concluding the entire meeting.

*** RESOLVE ANY UNFINISHED BUSINESS.** If there is not time to finish the agenda, suggest a way to handle this and seek group concurrence. You might table items to another meeting, or see if meeting staff can stay after formal adjournment to speak further with participants, or find some other way of follow-up.

*** SUMMARIZE RESULTS OF THE MEETING.** This can be done by the facilitator, or the facilitator can give a brief summary and ask others in the group to share what they each think was accomplished in the meeting. If you are working toward consensus, point out areas of agreement and disagreement. Use the recorder and the group record to help summarize main points. This gives participants an opportunity to check that their ideas were accurately heard and recorded.

*** DISCUSS "NEXT STEPS."** If the group is to meet again, talk about the next agenda or meeting opportunity. If people have been assigned to follow-up tasks, be sure these are understood and agreed upon.

*** CLARIFY WHAT WILL HAPPEN WITH THE RESULTS OF THE MEETING.** Let people know whether and how they will receive a copy of the meeting results, including a transcript of ideas or comments recorded on chart paper. Discuss how a report of the meeting might be shared with agency staff, decision-makers, or other groups not in attendance at the meeting, and how it will influence planning or decision-making.

*** INVITE PARTICIPANTS TO EVALUATE THE MEETING.** This can be done formally through the use of a written evaluation form, informally in discussion, or with both methods. Don't be afraid of criticism. Your willingness to ask "how have we done?" demonstrates your openness and builds trust. It also allows people to speak positively about the meeting.

*** THANK THE PARTICIPANTS.** Show people your appreciation for their time and efforts.

Common Dilemmas

Unexpected circumstances and challenges put the facilitator to the test. Below is a summary of the information in Part III of this guidebook, contained in the form of suggestions for responding to common meeting dilemmas.

DILEMMA

Too many people appear for the meeting

CHOICE IN TACTICS

Conduct a quick search for a nearby room or additional rooms.

Conduct the meeting and offer a second meeting date for overflow.

Conduct the meeting and acknowledge that people may be cramped and uncomfortable.

Demonstrate a sincere willingness to carry forth with the meeting and to listen to all concerns despite the size of the crowd.

Activate your meeting team to rearrange the room, and add chairs, even if it takes 10-15 minutes extra.

Consider modifying your meeting agenda and processes (e.g., omit small group discussions if insufficient space is available).

Set clearer, stricter, and more formal groundrules, especially for questions and comments, by asking only people with points of view different from the previous speakers' to comment and by setting and adhering to strict time limits for speakers.

Too few people appear for the meeting

Assume the meeting is still useful, because while you're not getting as broad a base of input, you do have the opportunity to interact more deeply with participants.

Let participants know they are valued and express appreciation for their attendance. Take the meeting seriously, don't dismiss a small group.

Ask people to move into a closer grouping.

Loosen up the agenda. Hold a more informal, conversational meeting.

**People are noisy,
disruptive, inattentive**

Assuming it is a natural response to events, rather than an organized disruption, determine the cause.

If people start buzzing in response to a surprising, controversial comment, give them a moment to ventilate. Then, move to the center-front of the group and, with arms raised and palms up, say, "Let's keep working together. Everyone who wishes will have a chance to respond." If in a small group, add, "Who'd like to comment on what you've just heard?"

If the disruptive response is to an overlong speaker, intervene by noting that because of others' desires to speak, you'd like this speaker to summarize in the next minute.

If the cause seems to be that the meeting is too slowly paced, pick up the tempo by summarizing where you are and moving on to the next agenda item.

If people appear tired or physically uncomfortable, suggest a short break.

**People are silent,
uncommunicative**

Determine the cause.

If people are shy about speaking before groups because of their personality or cultural expectations, gently invite specific individuals to speak. Encourage silent ones to contribute by asking, "Is there anyone at this table with something to add or with questions?"

If people seem to have hidden agendas or deeper reasons for not wanting to participate or cooperate, you may want to say "I need some help. What do you think about...?" Then, be quiet. Wait – as long as necessary – for people to respond.

Show that you are comfortable with occasional pauses or silences, allowing for reflection.

If silence means that there is nothing more to say, summarize the discussion, and check for completion by asking if there is "anything else to add" and, if not, move the group on to the next agenda item.

CHALLENGES AND ATTACKS:

In general

Treat them as opportunities that can provide new insights and breakthroughs.

Remain calm and non-defensive. Acknowledge the other's feelings of anger, fear, discomfort, confusion, or frustration.

Thank the "attacker" for so freely expressing his/her point of view.

Separate people from the problem, by focusing on the issue rather than the personality or behavior of the person.

Be honest and sincere, rather than in control, to increase credibility and to gain trust.

Avoid creating martyrs; respond humanely to even the most obnoxious challenger. Never attack in retaliation, no matter how tempting. Don't be snide, insinuating, or sarcastic.

Paraphrase to make sure you understand the concern.

Ask yourself if the demand is helping to fulfill the purpose of the meeting.

Check with the group. Ascertain silently or by asking the group whether an individual's request represents the group's desire or not.

Challenges to the agenda

Check to see whether the concern or request is already covered in the agenda. Determine whether there's a way to satisfy the concern without changing the agenda.

Check with the group to see if there is support for the request. If so, be flexible. The request may have merit even though you did not anticipate it. If so, by acceding to a requested change, you can gain valuable input and earn the trust of the group.

Remember that at large meetings, people are more likely to expect a formal, set agenda; at small meetings, people may expect a more open agenda and may expect to be involved in its development.

Demands to read prepared comments into the "record"

Assure the group that you want their information and that it will be read by the staff.

Remind people that the purpose of the meeting is to allow everyone who wants to speak the opportunity to do so and that accomplishing this purpose requires adhering to time limits for each speaker.

Express appreciation for the time and effort this person has expended in developing a thoughtful presentation and that the staff wants to consider his/her point of view by carefully reading it.

Ask if the person would care to summarize those written comments in the time allotted.

Attacks on written questionnaires or comment forms used in the meeting

Explain that this process ensures that even those people who prefer not to speak in front of groups will be heard.

State that such a process helps ensure that the number and diversity of points of view will be documented and heard.

Empathize with the concern that such responses may not get read or used.

Be sure to have time for oral comments and discussion in the meeting. Taking only written comments may leave people feeling alienated and controlled.

Ask a member of your team to explain what will be done with the written comments and how people will have access to follow-up and be able to see the results.

Resistance to a small group format and demands to stay in a large group

Describe the purpose of a small group discussion as providing a chance for everyone to speak, thus offering better feedback. Provide a time for small groups to report their results back to the whole group. Be sure there is a recorder for each group so that people are assured their comments will be documented and reviewed.

If there are thirty or fewer people in the large group and most resist breaking into smaller groups, then facilitate as a whole group discussion. Set a groundrule on the length of time each person can speak so that everyone can be heard.

If the general sentiment of a crowd is "We won't move!" you obviously can't force people into smaller groups; distribute paper on which they can write individual responses to questions that would have been discussed in smaller groups to be sure all ideas are fully described and recorded.

Attacking presenters with "You've already got your mind made up!"

Gently remind people of the purpose of these meetings.

Silently consider, "to what extent *is* this team's mind made up?"

Respond with, "Because we've been working so intently on this for some time, we may be having difficulty seeing it a different way, and we appreciate your working with us to explore all possible solutions."

Challenging with "You don't care about...!"

Establish rapport by demonstrating an understanding of the person's feelings by saying, for example, "You seem angry and that's understandable. It's frustrating dealing with complex issues."

Do not defend the agency or individuals.

Assure participants of your commitment to listen and to consider all points of view in an effort to seek solutions that avoid damaging anyone.

Acknowledge the difficulty of balancing many different values.

Explain that BPA is holding this meeting as one way to really hear the nature and depth of concerns.

**Challenging with
"You're incompetent!"
or by pointing out
mistakes**

Do not distance yourself even more by "pulling back" and being professional and pedantic. Speak from the heart, not the head, and acknowledge the feeling being expressed.

Communicate respect for the other person, both verbally and non-verbally.

Demonstrate your willingness to keep searching for better ideas.

Be honest with yourself and the group. If there's information you've overlooked, a point of view you haven't considered, an error in judgment, an omission, acknowledge it. Express appreciation for having it brought to your attention, because that's what creative problem-solving is all about.

If the accusation is "wrong," calmly, unemotionally, and briefly describe what you've done.

Seek clarity by asking, "Have I responded to the concern you raised, or is there more you want me to consider?" If the attacker doesn't seem to hear, invite the person to speak with you personally after the meeting.

Challenging Data

Welcome such attacks. They give you a chance to help increase everyone's understanding.

Paraphrase to be sure you know what's being sought.

Determine whether such challenges reflect the concerns of more than just a few people.

Err on the side of patience. If people are distrustful, but your responses to questions about data or their interpretations seem to be engendering trust, continue. It is worth the time.

Remember, you may lose sight of how complex and incomprehensible the information is to others. It may be second nature to you, but baffling and overwhelming to others.

Remember, information is power. The better informed people are, the more able and willing they are to cooperate in problem-solving. You can reduce their sense of powerlessness by willingly showing people information and answering their questions.

Honestly acknowledge any data gaps.

Put yourself in such challengers' shoes. Try to see how they're seeing and "misunderstanding" it so you can explain most effectively.

Conclusion

*"If your mind
is not projected
into your hands,
even ten thousand techniques
will be useless"*

– Tesshu Yamaoka

If you have read all the material in this book, your mind is full, perhaps too full. But if you have absorbed it with a certain openness, with a relaxed and receptive mind, your body and your intuition will lead you in discovering useful ways to apply this information.

The new leader is a facilitator. Leadership is not a quality unique to people in high or elected positions. It is a quality of every person who cares about the future and wishes to take part in shaping it. In the years to come, the skills of facilitation will be acquired and refined by many people. We are still learning and discovering ways to work together in groups to build consensus, resolve conflicts, and make decisions. We are seeking ways to honor diversity, individuality, and differences, while building unity and agreement on the issues which affect us all.

This is just, however, a beginning. The way to learning is through practice and experience. Every day there are opportunities to practice the skills of facilitation, because every day there are meetings. Sometimes only one facilitative suggestion or action can be enough to make a discussion work better.

How often, for example, do we find ourselves in a conversation with co-workers or friends in which we become impatient, pushing too hard to be heard while taking little time to listen; or find ourselves under attack, curling up into a defensive ball rather than remaining open, willing to focus on the problem rather than each other? Or we find ourselves in a meeting that is rambling and confusing, and no one takes the initiative to suggest a simple brainstorm to clarify the problem or to develop a list of what needs to be accomplished in the meeting. Opportunities for practice are abundant.

So give it a try. Most likely you already have. You will find some surprising and beneficial results, not only in meetings, but in your communication and relationships, both at work and in the community.

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