

HERDING CATS SYNDROME? FACILITATION SKILLS MAY BE FOR YOU!

SE Rural Philanthropy Days

Lamar, CO

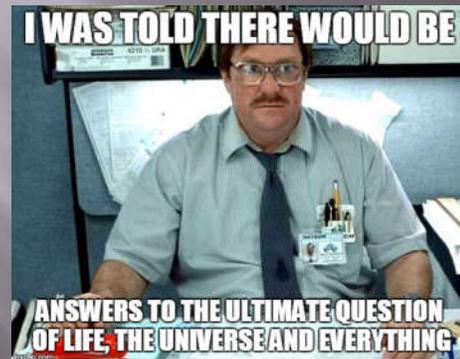
June 14, 2018



Credit Where Credit is Due

- ▣ I do not consider myself an expert and I do not like to re-invent the wheel.
- ▣ Today's presentation is a synthesis of good work others have done and they deserve the credit.
 - The Community Tool box from the Center for Community Health and Development, University of Kansas.
 - <https://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation>
 - Facilitation at a Glance, by Ingrid Bens
 - <https://goalqpc.com/custom-books/>

Are You Here Because?



To Better Illustrate...



Today's Menu

- ▣ Facilitation Skill Overview
- ▣ Planning
- ▣ Facilitating a Meeting or Planning Session
- ▣ Effective Decision Making
- ▣ Facilitating Conflict
- ▣ Managing Meetings
- ▣ Process Tools for Facilitators



Quick Survey (audience participation required)

- ▣ Please briefly share characteristics of the worst (or best) facilitation experience you have ever experienced or witnessed?
 - What made it the worst (or best) in your opinion?



Facilitation Overview

- ▣ What are Facilitation Skills?
 - Most community organizations are geared toward action.
 - How do we focus our organization members?
 - Leaders and members need facilitation skills
 - ▣ These are "process" skills to guide and direct



Facilitation Overview

- Facilitation is a way of proving leadership without actually taking the reins. A facilitator enables others to assume responsibility to take the lead. Typical tasks include (but may not be limited to):
 - Conduct background research
 - Help the group define the goal
 - Develop detailed agenda
 - Help create rules of conduct
 - Test assumptions, question, and probe
 - Encourage participation by all
 - Guide discussion to keep on track
 - Achieve closure and ID next steps

Facilitation Overview

- Content vs. Process
 - Content of any meeting is the WHAT is being discussed or the task at hand.
 - Usually expressed in the agenda and words spoken
 - If the person leading the meeting introduces something with intent to influence = process leader
 - Process is the HOW things are being discussed (procedures, methods, format, tools used, etc.)
 - Also includes style of interaction, group dynamics, and the climate established.

Facilitation Tools

- Core Practices
 - Staying Neutral
 - Active Listening
 - Asking Questions
 - Continuous Paraphrasing
 - Summarizing Discussion
 - Recording and Synthesizing Ideas
 - Keeping on Track
 - Testing Assumptions
 - Managing the Climate

Facilitation Tools

- Process Tools
 - Visioning Force-Field Analysis
 - Brainstorming
 - Priority-setting Surveys
 - Root-Cause Analysis
 - Gap Analysis Decision Grids
 - Systematic Problem Solving

Core Practices

- ❑ Neutrality – is the hallmark of a facilitator
 - There to provide structure and create climate of collaboration. Is no intent to impose own views.
- ❑ Active Listening – listen to understand rather than judge. Look at body language and use eye contact to acknowledge points and prompt.
- ❑ Asking Questions – Fundamental tool. Can test assumptions, probe for information, encourage.
- ❑ Paraphrase Continually – repeating what is said. Lets people know they are heard
- ❑ Summarizing – ensure everyone has heard all ideas put forth

Effective, but...



Techniques

- ❑ Recording Ideas – attendees need to leave with complete and accurate notes summarizing discussions.
- ❑ Synthesize Ideas – ping-pong ideas around the group to build on each other's ideas.
- ❑ Keep Discussion on Track – tactfully point out when veering off track (parking lot sheet)
- ❑ Testing Assumptions – always look for possible misunderstandings and probe carefully to uncover

Techniques

- ❑ Manage Group Climate – help set group norms or guidelines, intervening tactfully when members are not adhering
- ❑ Make Periodic Process Checks – tactfully stop the action when effectiveness declines. Make sure purpose is still clear to everyone
- ❑ Give and Receive Feedback – offer perspective if notice adjustment needs to be made, including receiving suggestions from group about adjustments.

Staying Neutral

- ▣ Strategy: Ask Questions
 - "What are the benefits of X?"
- ▣ Strategy: Offer Suggestions
 - "I suggest you consider researching the pros/cons of X."
- ▣ Strategy: Take off Facilitator Hat (clearly indicate when doing this)
 - "I need to step out of the facilitator role for a moment to tell you X."
 - Say "good point" instead of "good job."
 - Use "We" ("How are we doing on time?" or "Let me read back what you've said so far.")

How Assertive?

- ▣ Stay non-directive on the topic discussed but be assertive on the process aspects.
 - OK to inform on how agenda items will be handled, which discussion tools to use, who speaks when, etc.
 - May require you to be firm and act like a referee at some point (such as personal attacks)
 - Insist on meeting design and norms
 - Stop to check process and summarize
 - Calling time-out or break
 - Intervening to stop rude behavior and call on quiet
 - Ask probing question to challenge assumptions
 - Insist on closure and evaluation

Language of Facilitation

- ▣ Paraphrasing – describing in your own words what another person is trying to convey
 - "Do I understand you correctly that..."
 - "Are you saying..."
 - "What I am hearing you say is..."
- ▣ Reporting Behavior – stating the specific, observable actions of others w/o accusations or generalizations about people or motives.
 - "I'm noticing that we've only heard from three people."
 - "I'm noticing several people looking through their journals and writing"

Language of Facilitation

- ▣ Describing Feelings – specifying or identifying feelings by naming with a metaphor or figure of speech.
 - "I feel we've run out of energy."
 - "I feel as if we've hit a brick wall."
 - "I feel like a fly on the wall."
- ▣ Perception Checking – describing another's inner state to check if perception is correct.
 - "You appear upset by the last comment. Are you?"
 - "You seem impatient. Are you anxious to move on?"

Conversation Structure

- ▣ Non-Decision-Making Conversations – group members simply share ideas or information.
 - Brainstorming session w/ no judgment
 - Information-sharing in which members describe experiences or update each other
 - Discussion aimed at making list of individual preferences or key factors of a situation



Conversation Structure

- ▣ Decision-Making Conversations – member ideas are combined to arrive at action plan or rule that all feel can accept/implement.
 - Facilitator manages these differently because the focus is to help members reach a shared agreement
 - Involves sharing of ideas, ping-ponging ideas around so others can add thoughts, making summary statements and recording ideas.
 - Differs from non-decision-making where no action plan occurs and is a one-way dialogue with the facilitator recording individual ideas.

Planning

- ▣ Climate and Environment
- ▣ Logistics and Room Arrangement
- ▣ Ground Rules



Climate and Environment

- ▣ For good participation, people need to feel safe and comfortable about interacting with each other and participating.
 - “Is the location a familiar place where people feel comfortable?”
 - Could the location be intimidating for some?
 - “Is the meeting site accessible to everyone?”
 - Do some feel they have to come too far?
 - “Is the space the right size?”
 - Needs to match the size of the group

Logistics and Room Arrangement

- Where people sit, if they are hungry, and whether or not they can hear you makes a difference.
 - Chair arrangement: circle or around a table. Podiums or lecture make people feel formal.
 - Place to hang newsprint: tape to walls? Easel? Etc...
 - Sign-in sheet with a table for people to use
 - Refreshments: hunger takes the mind off the task at hand – who will set up, clean up, etc.
 - Microphones and AV equipment? What is needed and who will test prior to beginning.

Importance of Ground Rules



Ground Rules

- Most meetings have some kind of operating rules. Best to have group develop them. Common rules include:
 - One speaks at a time
 - Raise hand if have something to say
 - Listen to what others are saying
 - No mocking or attacking ideas
 - Be on time returning from breaks
 - Respect each other
 - No cell phones

Ground Rules

- Process to develop ground rules:
 - Begin by telling everyone you want to set up ground rules and put up a sheet of paper to record
 - Ask for suggestions. If none, start by putting up one of your own to start people off.
 - Write any suggestions on the paper – “check in” with the group before writing the idea
 - “Billy suggested we raise our hands if we have something to say. Is that OK with everyone?”
 - When finished, ask if everyone agrees and can abide
 - Make sure you actually get people to say “yes” out loud

Facilitating the Session

- ▣ Start Meeting on Time
 - If you do not start on time, those who were there and ready feel cheated that they rushed to get there. No more than 5 min. late.
 - If someone comes in late, wait until break or another appropriate moment for them to introduce themselves.
- ▣ Welcome Everyone
 - Welcome everyone who comes. Do not complain about a small turnout! Go with what you have and analyze reason for turnout later.

Facilitating the Session

- ▣ Make Introductions (several ways to do this)
 - Questions to ask members to include in introduction (depending on reason for meeting):
 - "How did you first get involved with...?"
 - "What do you know about...?"
 - "What makes you most angry about this problem?"
 - Ice Breaker can be combined with introductions
 - Breaks down feelings of unfamiliarity and shyness
 - Shift roles from "work" self to "human" self
 - Build sense of being part of a team
 - Creates networking opportunities
 - Helps participants share skills and experiences

Icebreaker?



Facilitating the Session

- ▣ Ice Breaker Ideas
 - Three fact pair interview: In pairs, have each interview the other person
 - Name, organization, and three facts. They then introduce each other to the group.
 - Small group puzzle – introduce self to small group before beginning
 - Large Group – two truths and a lie.
 - Group decides on which is false
 - Participants receive a survey and have to interview other participants to find the answers
 - Skills, experience, opinions on the issue, etc.

Facilitating the Session

- ▣ Important things on Ice Breaker/Introductions
 - Everyone needs to participate - only exception may be latecomer but at first opportunity ask them their name and information
 - Be sensitive to culture, age, gender, and literacy levels or any other factors. Don't do it just because it sounds "fun."
 - Make everyone feel welcome, but this gives you a chance to see opportunities
 - Do not forget to also introduce yourself. Credibility is not just about your degree and years of experience.



Facilitating the Session

- ▣ Reviewing Agenda, Objectives and Ground Rules
 - Preview what will happen at the meeting
 - Check to make sure the group agrees and likes the agenda
 - The same goes for meeting outcomes
 - What is the group trying to accomplish



Facilitating the Session

- ▣ Encouraging Participation
 - Anticipate potential roadblocks and be ready to address them
 - too many meetings
 - exhausted from being overworked
 - confusion about the topic
 - lack of commitment to topic
 - insecurity to speak up
 - dominant may shut down others
 - intimidated by supervisors present
 - low levels of trust and openness
 - recent traumatic event causing stress or withdrawal
 - organizational history of not being supportive of employee suggestions, etc.

Facilitating the Session

- ▣ Encouraging Participation
 - Removing the Roadblocks
 - Break the Ice (use ice breakers, humor, eye contact)
 - Clarify your role (be clear about your neutrality)
 - Clarify the topic (review history of the situation, share input members gave prior to meeting, engage participants for purpose statement, state the goal).
 - Create Buy-in: ask "What's in it for me?"
 - "What is the gain for the organization?"
 - "How will you personally benefit?"
 - Identify organizational support

Facilitating the Session

- ▣ Encouraging Participation
 - Some Ideas (allow anonymity and generate energy)
 - Discussion Partners
 - Question to large group then discuss with a partner and report out
 - Tossed Salad
 - A good method for confidential brainstorming
 - Issues and Answers
 - One issue per sheet posted around the room - go to that sheet and discuss with everyone else there
 - Talk Circuit
 - Pass the Envelope
 - Also a good way for anonymous brainstorming
 - Group Participation Survey

One View of Participation...



Facilitating the Session

- ▣ Rules on Wording
 - #1 - Use their Words
 - Listen carefully for key words and ensure those are included
 - "I'm writing the word 'disaster' because you emphasized it."
 - If you don't understand a point or lose focus, recap!
 - #2 - Ask Permission to Change Words (but make sure it is what's intended)
 - "I've shortened this to.... Is this OK?"
 - "Can I use the word..."
 - "Tell me what you want me to write down"
 - "Give me the exact words you need to see on the page."

Facilitating the Session

- ▣ The Flip Chart “Don’t” list
 - Do not write down personal feelings or interpretation. If unsure, ask.
 - Do not worry about spelling as it may inhibit discussion.
 - Do not hide behind the chart or talk to it.
 - Do not stand passively beside the chart without writing anything down
 - Do not monopolize the flip chart
 - Do not monopolize the meeting process

Facilitating the Session

- ▣ The Flip Chart “DO” list
 - Write down exactly what is said
 - Use concrete verbs and complete phrases
 - Talk and write at the same time (keeps pace)
 - “work group to meet a 10:00 a.m.”
 - Move around and act alive, not chained to the chart.
 - Use black, blue, or dark color marker. Fairly large letters to read from back of room.
 - Post flip sheets around the room
 - Whenever possible, let others take over facilitation to build commitment

Facilitating the Session

- ▣ Stick to the Agenda
 - When you hear the discussion wandering off, say something like:
 - “That’s an interesting issue, but perhaps we should get back to the original discussion.”



Facilitating the Session

- ▣ Process Checking Structure
 - Progress – ask members if they think the goal is being achieved. Is the purpose still clear?
 - Process – ask members if they think the tool or approach being used is working. Ask how much longer they are willing to try that tool.
 - Pace – ask members if things are moving at the right pace, particularly when timelines are not being met.
 - People – ask people how they are feeling. Do this if notice people are growing silent, withdrawing, or if they look frustrated

WOW! This is a LOT of Information



But BEAR with me!



The Art of Questioning

- ▣ Effective questioning is a key facilitative technique, but it has to be the right question at the right time.
 - To stimulate thinking – allow people to respond voluntarily and avoid putting someone on the spot
 - To ask the group a question – ask something like “What experiences have any of you had with...?”
 - To choose one person to respond – direct question to that individual “How should we handle this, Bill?”
 - To seek out the expert resource – direct it to that person “Mary, you have experience with this policy. What would you do?”

The Art of Questioning

- ▣ Handling questions and responding to comments. If you are asked specifically for your opinion:
 - Redirect the question to a group member or team
 - Defer any questions beyond the scope of those present and commit to getting back to them later
 - After you advise you are no longer playing the process role, state you are providing expert input
 - Instead of praising content by saying “That was a good idea!” say something like “Thank you for offering that idea.”

The Art of Questioning

- Closed-Ended or Open-Ended Questions
 - Closed-ended require one-word answers
 - “Does everyone understand?”
 - Open Ended stimulate thought and longer answers
 - “What ideas do you have to explain the need?”



The “Do” List of Questioning

- Ask clear, concise questions covering a single issue.
 - No rambling that covers multiple issues
- Ask challenging questions that stimulate thought.
- Ask reasonable questions based on what people know.
- Ask honest/relevant questions
 - No “trick” questions designed to fool someone

Questioning Formats

- Fact-finding: targeted at verifiable data (who, what, when, where, how much)
 - “What kind of a computer system are you know using?”
- Feeling-finding: asks for opinions, feelings
 - “How do you feel about the quality of our equipment?”
- Tell-me-more: encourages participants to provide details
 - “Tell me more” and “Can you elaborate on that?”
- Best/Least Questions: helps one understand opportunities in the present situation
 - “What is the best part of receiving a new computer?”

Questioning Formats

- Third-party: helps uncover thoughts indirectly
 - “Some people find that computer training is too time consuming. How does that sound to you?”
- “Magic Wand”: temporarily removes obstacles from a person’s mind
 - “If time and money were no obstacle, which type of computer system would you choose for the team?”



Sample Probing Questions

- ❑ Describe the current situation as you see it
- ❑ How would the most important customer describe the situation?
- ❑ How would a senior manager describe the situation?
- ❑ How do most people feel about the situation?
- ❑ Why hasn't this problem been solved and for how long?
- ❑ Who wants changes to occur? Who does not?

Sample Probing Questions

- ❑ How do you and others contribute to the issue (positive or negative)?
- ❑ What would it look like if the problem were totally resolved?
- ❑ On a scale of 1-10, how serious would you say the problem is? Why is it not one point higher (or less)?
- ❑ What are the significant barriers to solving the problem?
- ❑ Which solutions are going to be unacceptable?

Sample Probing Questions

- ❑ On a scale of 1-10, how would you rate your commitment to solving? Why not one point more (or less)?
- ❑ What are some boundaries or guidelines you would suggest for this project?
- ❑ What would be the best/worst possible outcome?
- ❑ What will help this project/initiative succeed?

Best Things A Facilitator Can Do

- ❑ Carefully assess needs of members
- ❑ Probe sensitively into people's feelings
- ❑ Create and open and trusting atmosphere
- ❑ Help people understand why they are there
- ❑ View yourself as serving the group's needs
- ❑ Make members the center of attention
- ❑ Speak in simple and direct language
- ❑ Work hard to stay neutral
- ❑ Display energy and appropriate level of assertiveness

Best Things A Facilitator Can Do

- ❑ Champion ideas you do not personally favor
- ❑ Treat all participants as equals
- ❑ Stay flexible and ready to change direction if necessary
- ❑ Listen intently to fully understand what is being said
- ❑ Make notes that reflect what participants mean
- ❑ Periodically summarize related ideas into a coherent summary
- ❑ Know how to use a wide range of process tools

Best Things A Facilitator Can Do

- ❑ Make sure every session ends with clear steps for the next meeting
- ❑ Ensure participants feel ownership for what has been achieved
- ❑ End on a positive and optimistic note

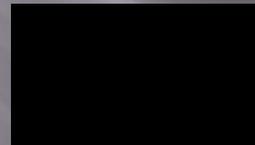


Worst Things A Facilitator Can Do

- ❑ Remain oblivious to what group things or needs
- ❑ Never check member concerns
- ❑ Fail to listen carefully to what is said
- ❑ Lose track of key ideas
- ❑ Take poor notes or change the meaning
- ❑ Try to be the center of attention
- ❑ Get defensive
- ❑ Get into personality battles
- ❑ Put people down
- ❑ Use inappropriate humor

Effective Decision Making

- ❑ Defining the Problem



Effective Decision Making

- ▣ What are some challenges?
 - Not enough information (problem not well-defined)
 - Key players are not at the table
 - Confusion about the purpose or what attempting to accomplish
 - Missing process (or the wrong process)
 - Domineering attendees
 - Frustration and deciding just to give up and move on without closure
 - Does the group have the power to decide

Effective Decision Making

- ▣ What kind of Conversation?
 - Information Sharing
 - Updates, reports, brainstorming, etc.
 - Planning
 - Defining action steps, objectives, outcomes, etc.
 - Problem Solving
 - Engaging participants to ID and resolve issues together
 - Relationship Building
 - Includes activities that help the group get to know each other and become a more cohesive group

Effective Decision Making

- ▣ What Level of Empowerment?
 - Management decides then informs staff
 - Usually involves telling, directing, management in control and staff expected to comply
 - Management gets staff input before decision
 - Usually involves selling and coaching with using employee ideas in the decision
 - Employees decide and then recommend
 - Involves more participation and facilitation with shared accountability
 - Employees decide and act
 - Involves delegating and collaborating with employee accountability and responsibility

Effective Decision Making

- ▣ What are the Options?
 - Consensus Building – everyone clearly understands the situation and jointly agrees: “I can live with it.” Best used when decision impacts the entire group.
 - It is collaborative and generates buy-in but takes time and gives low-quality decision without proper data
 - Multi-Voting – sets priority based on rank order with criteria when there are a lot of options on the table
 - It is objective, systematic, encourages participation and non-competitive but often has limited discussion that may decrease full understanding of the issues
 - Compromise – is a negotiated solution when two or more polarizing opinions exist
 - It generates discussion and results in a solution but can be adversarial by nature

Effective Decision Making

- ▣ What are the Options?
 - Majority Vote – allows people to choose the option they like after clear choices emerge. Typically with show of hands or secret ballot. Best used if a quick decision is needed and division within the group is acceptable
 - It is fast and can yield to high quality decision if there was adequate discussion. Show of hands may pressure some to conform
 - One Person Decides – group decides to defer to one person in the group to decide on behalf of the group. Best used on less important decisions or only one person has the information necessary
 - It is fast and efficient but may divide the group

Effective Decision Making

- ▣ Importance of Consensus Building
 - Sharing of ideas
 - Everyone’s ideas are heard
 - Active listening with paraphrasing the ideas
 - People build on the ideas of others
 - No push to a pre-determined solution
 - Final solution built on sound information
 - Satisfaction that people were part of the final decision
 - All feel consulted and involved and can “live with it.”



Effective Decision Making

- ▣ Consensus is not going to make everyone happy
 - Discussion continues until everyone indicates he/she can live with the outcome.
 - Do not ask, “Do we all agree?” or “Is everyone happy?”
 - Instead ask, “Do we have a well-thought-through outcome that we can all feel committed to and that everyone can live with?”
 - Do not be tempted to pressure dissenters into agreement
 - There will not be 100% agreement

Effective Decision Making

- ▣ Overcoming Blocks to Consensus
 - Attempting to pressure dissenters could lead to "groupthink."
 - Reframe the perception that the dissenter(s) may have an important idea overlooked by the group.
 - Acknowledging that can lead to discussion and a better decision.
 - ▣ The dissenter will also be more likely to feel heard
 - "Tell us the specific issue that you have with the group's decision? What do you see as the flaws? What has been overlooked?"
 - "What changes do you propose could be made to the group's solution that would be acceptable to you?"

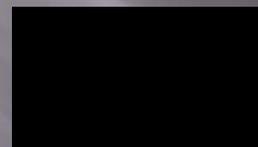
Effective Decision Making

- ▣ Effective Decision-Making Behaviors (whether a facilitator or participant)
 - Listen politely, even if you don't agree
 - Paraphrase points made to another person, especially if you are about to contradict their ideas
 - Praise the ideas of others
 - Build on the ideas of others
 - Ask others to critique your ideas
 - Be open to accepting alternative courses of action
 - Deal with the facts
 - Stay calm and be friendly

Effective Decision Making

- ▣ Behaviors that Hinder Effective Decision-Making (whether a facilitator or participant)
 - Interrupting others in mid-sentence
 - Not acknowledging ideas of others put on the table
 - Criticizing ideas of others, as opposed to feedback
 - Pushing your own ideas while ignoring others
 - Becoming defensive when your ideas are assessed
 - Sticking to only your ideas and blocking alternatives
 - Basing arguments on feelings rather than logic
 - Becoming overly emotional; showing hostility over disagreement

An Alternative Method to Problem-Solving





Facilitating Conflict

- Instead of talking about conflict, talk about differing views. Be calm, but assertive.
- Managing Conflict (Two Steps)
 - Venting – primarily involves listening to people so they feel heard and so the emotions are diffused. They will not be ready to move on until that happens.
 - Resolving the Issue – Once the feelings have been expressed, help the members resolve the issue with a structured approach to reach a solution.

Facilitating Conflict

- When venting conflict:
 - Slow things down – stop the action and ask to slow down. Use that time to take some notes and ask speakers to repeat themselves or ideas.
 - Stay completely neutral – do not take sides
 - Watch your language – do not say arguing, conflict, anger, etc.
 - Stay calm yourself – do not raise your own voice, speak slowly and with an even tone. Watch body language
 - Emphasize Listening – paraphrase key points and ask others to tell the group what they are hearing

Facilitating Conflict

- When venting conflict:
 - Go back to the agenda and Ground Rules – ask the difference between healthy debate and argument and find out which would rather have.
 - Be assertive and make interventions – you may have to play referee. Insist on the rules (no interruptions, etc.)
 - Record Key ideas – read the notes back and then ask if the group is ready to move on to resolution
 - Ask permission to move on – see if members feel their point of view has been heard and acknowledged.

Facilitating Conflict

- Choices When Resolving Conflict:
 - Avoidance - offer the option of placing it in the parking lot to be resolved at a later time (10%)
 - Accommodation - ask people to be more tolerant and accept the views of others. (5%)
 - Compromise - look for middle ground and ask each to give something (20% with polarizing issues)
 - Competition - debate until one wins. Facilitators do not use (divisive)
 - Collaboration - face conflict and draw attention to the issues. Systematic win-win problem solving (65%)

Facilitating Conflict

- If Serious Enough to Intervene:
 - Describe what you see (non-judgmental with no motive)
 - "I'm noticing that we are now on a topic not on the agenda."
 - Make an impact statement - tell members how the action is impacting you, process, or others. Base it on observation.
 - "I'm concerned that you aren't going to get to your other topics today."
 - Redirect ineffective behavior(s)
 - "What do we need to do to get back to our agenda?"
 - "Would you please end this conversation so we can get back on track?"

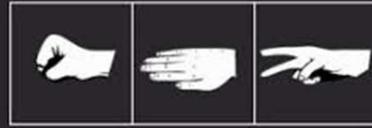
Facilitating Conflict

- Telling vs. Asking
 - Asking is better because people are more likely to accept their own intervention
 - The more a group acts in a mature and responsible manner, the more effective it is to ask than tell.
 - A directive or telling is appropriate if individuals are showing dysfunctional or low-maturity behavior. Asking in these cases will likely not achieve the desired response.



If All Else Fails...

**LET'S SETTLE THIS
LIKE ADULTS.**





Dealing with Disruptions

- ▣ Try “Preventions” First
 - Get agreement on the agenda and ground rules
 - Process creates a sense of shared accountability
 - Listen carefully
 - Do not pretend to listen, people can tell
 - Show respect for experience
 - Encourage people to share their knowledge, stories, and strategies
 - Find out group’s expectations
 - Uncover why the group thinks it is meeting
 - Finish the statement “I want to leave here today knowing...”

Dealing with Disruptions

- ▣ Try “Preventions” First
 - Don’t be defensive
 - If attacked or criticized, take a “mental step” backward before responding. You risk losing trust if the group feels they cannot be honest.
 - “Buy-in” power players
 - If possible, acknowledge them up front and give them roles to play during the meeting (such as getting feedback at breaks about how meeting is going)

Dealing with Disruptions

- ▣ On to “Interventions”
 - Have the group decide
 - If someone is dominating – remind about the agenda then allow the group to decide on that person’s participation
 - Use agenda and ground rules
 - Remind group of the agreement they made at the beginning
 - Be honest: say what is going on
 - Better to point out what is going on rather than try to cover it up. Most probably see it anyway.

Dealing with Disruptions

- ▣ On to “Interventions”
 - Use humor – one of the best ways to lessen tension, especially if self-deprecating
 - Accept or legitimize the point
 - “It is a very important point and one I’m sure we all feel is critical. Let’s deal with your issue for 5 minutes and then we need to move on.”
 - Use body language – move closer to those talking, make eye contact
 - Take a break if the other things are not working. Make it clear outside that the disruptions need to end.
 - Confront in the room – last resort, if it will not create backlash, and if the group will support you

Managing Meetings

- ▣ The “Meeting Killers”
 - Wasting meeting time
 - Wasting people’s time
 - Boring meetings that go nowhere
 - Meeting for the sake of meeting



Managing Meetings

- ▣ Planning
 - What is the Goal?
 - Revise by-laws? Collect information? Vote on policy?
 - Do your homework! It will matter.
 - Who should be there?
 - If the people who need to be there aren’t, it was a waste of everyone’s time
 - Plan with others
 - Helps develop new leaders and buy-in
 - Good agenda is important!
 - Have time limits and send out a week in advance!

Managing Meetings

- ▣ Setting Up
 - Start and End on Time
 - It is disrespectful to abuse the time of members, regardless of how many are there when it is to start.
 - Sign In – also opportunity to update information
 - Make Everyone Comfortable
 - Avoid the rows – make it the right size room
 - Informal Time to Socialize (don’t forget the “meeting after the meeting” as an opportunity)
 - A Regular Cycle is Best
 - Have a clear goal or don’t meet – cancel if necessary

Managing Meetings

- Running the Meeting
 - Introductions (could be icebreaker)
 - Agree on Agenda and Rules (ask for feedback on agenda before beginning)
 - Keep Discussion on Track
 - Gentle but firm – people will remember bad meetings
 - Watch the Time!
 - “We’ve already used our allotted time for this issue. Would everyone like to continue for five minutes or move on?”
 - Summarize What You Hear – then move on if no objections to the summary
 - Encourage Participation – draw everyone in
 - Use Your Position Wisely – remain neutral and fair

Bad Example



Managing Meetings

- Meeting Follow-Up (See also: Next slide)
 - Gather feedback from the group
 - What could be improved? What worked?
 - Make Follow-up Calls
 - Are assignments clear, correspondence needed, etc.
 - These often hold the group together
 - Summarize the Meeting
 - Have a list of decisions made, with follow-ups
 - Formal minutes may be boring, but are necessary
 - Consider placing decisions in **bold face** or ALL CAPS
 - Same for follow-ups

Ending A Facilitation

- A big meeting pitfall is to end without real closure or detailed next steps. Always provide a summary of key points.
 - Non Decision Making Session: simply provide a summary of points discussed.
 - Decision Making Session: Summarize, ratify the decision, and clearly outline the action steps. Can include:
 - Review details of decision
 - Check decision for clarity and completeness
 - ID next steps and create detailed action plan
 - Troubleshoot the Action Plan
 - Round up parking lot items
 - Decide on means of follow-up
 - Evaluate the session

Process Tools

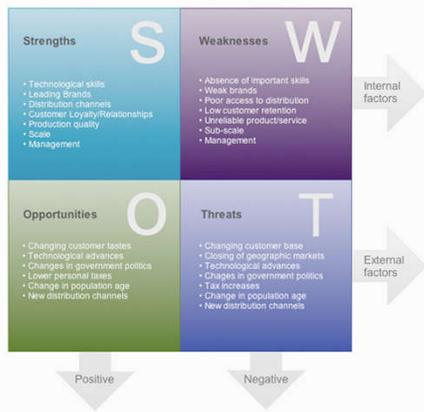
- Appreciative Review
 - What: positive discussion about the past in which members answer questions about recent events to explore all good things that have happened
 - When: When morale is low or falling
 - Impact: Allows members to reflect on accomplishments and get some recognition.



Process Tools

- S.W.O.T Analysis
 - What: Strengths, Weaknesses, Opportunities, Threats
 - When: To provide framework at the beginning of strategic planning
 - Impact: Allows examination of positives and negatives and fosters a growth-oriented structure while allowing to examine possibilities.

SWOT Analysis



Process Tools

- S.O.A.R. Analysis
 - What: Strengths, Opportunities, Aspirations, Results
 - When: To set a positive tone for planning conversations or at strategic retreats
 - Impact: Creates upward spiral of thought, action, and behavior. Encourages creativity and out-of-the-box thinking. Same essential outcome as the S.W.O.T. Analysis



Process Tools

- Visioning
 - What: Highly participative approach to goal setting.
 - When: When members need to clarify their own thoughts and share ideas to create a shared statement of the desired future
 - Impact: Encourages participation from everyone and energizes participants. All ideas are to be heard. Good for goal setting.

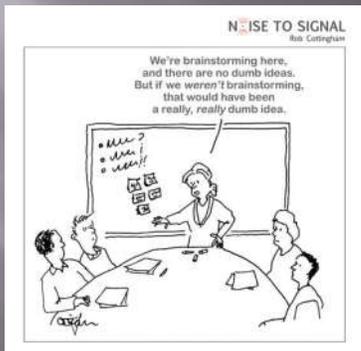


Process Tools

- Brainstorming
 - What: Systematic technique that frees people to think creatively and generate ideas.
 - When: When a free flow of creatives not bound by the usual barriers is needed.
 - Impact: Frees from thinking about usual considerations and fosters creative thought. No judging and all ideas are heard.



Brainstorming Fail...



Process Tools

- Force Field Analysis
 - What: Structured method of looking at two opposing forces acting on a situation.
 - When: When you need to bring out all factors and/or barriers in play.
 - Impact: Encourages balanced decision-making.



Process Tools

- Gap Analysis
 - What: A planning tool that lets groups identify the steps needed to take to achieve a goal.
 - When: When you need the group to understand where it is vs. where it needs to be.
 - Impact: Creates a shared view of what needs to be done to eliminate the gap between the current state and desired future state.



Process Tools

- Multi-Voting
 - What: A priority-ranking tool that enables the group to sort through a long list of ideas.
 - When: After any idea-generating discussion.
 - Impact: Democratic and participative. Creates the “I can live with it.”



Process Tools

- Root Cause Analysis
 - What: A systematic analysis of an issue to ID the root causes rather than symptoms.
 - When: delving deeper than surface symptoms.
 - Impact: Allows to look more deeply at the actual problem and underlying causes - likely to give a more definitive resolution.

**ROOT
CAUSE**



“To address this mistake we must use root-cause analysis. I’ll begin by saying it’s not my fault.”

Process Tools

- The 5 Whys
 - What: Simple (but powerful) technique for getting to the root of a problem.
 - When: Analysis step of problem solving.
 - Impact: Get past the symptoms to the deeper underlying layer of causes.
 - Use voting dots after if multiple causes identified



Process Tools

- Decision Grid
 - What: Matrix of critical criteria use to assess a set of ideas to determine the most likely to offer the best solution.
 - When: For more objectivity and thoroughness.
 - Impact: Allows each potential solution to be objectively evaluated.

Idea/Qualification	Decision Matrix				
	Weight	1	2	3	4
Cost	10	3	4	3	3
Time to build	10	3	3	4	3
Time to test	10	3	3	4	3
Time to change	10	3	3	4	3
High speed (100km/h)	10	3	3	4	3
Distance (1000 miles)	10	3	3	4	3
Total		45	45	50	45

Process Tools

- In the interest of time... A list of others
 - Troubleshooting
 - Exit Survey
 - Survey Feedback
 - Needs and Offers Dialogue
 - Gallery Walk
 - Systematic Problem Solving (with worksheets)

One Other Possibility...

(but that is a whole other presentation)



Wow, That was a Lot!
Thanks for hanging in there!

