Good Group Handout

by Craig Freshley

Meeting Facilitation Techniques: Four Essential Functions

When a group makes a deliberate separation between substance and process — puts the process functions in the hands of a neutral facilitator and leaves substance to the group members — it fosters fairness, collaboration, and creativity. When you separate *substance* from *process*, both are better.

In my experience the best meeting facilitators do the following four essential functions really well. Each of these may be done in a wide variety of ways with a wide variety of styles — go for it! But these are the basic functions:

Provide structure

Good meeting facilitators provide structure in a number of ways. They are crystal clear on the purpose of the meeting and the purpose of each discussion. They design processes to match the purposes. They provide and model meeting guidelines for group behavior. The good facilitator always knows where the group is in any discussion and what's next.

Here are some specific techniques, in brief.

- Make sure that the objectives are clear and hold to them
  - Try to get advance buy-in to objectives
  - State the objectives at the start, refer to them throughout
  - Define the problem to be solved or the question to be answered

- Develop and use agendas with timing
  - Write the agenda, so everyone knows the plan
  - Changing the plan is fine if needed to meet the objectives

- Call on people in deliberate ways
  - Most important ground rule: the facilitator calls on people
    - Without this, facilitators have little leverage
  - Methods
    - Call on people in a designated order
    - Round Robin / Talking Stick
    - Color Cards

- Say where we are
    - Weaving every few comments. Pause to state the topic of discussion.
    - Provide advance notice about what's coming up next
    - When a new person enters the meeting, say where we are

- Stay on track
    - Have an agenda with times. That's the track.
    - Pause occasionally and point out the time relative to the agenda
    - Pause and "do the math out loud"
        - Divide time available by the tasks at hand
    - Use a timer with a time's-up sound that everyone can hear
    - Have a basket or parking lot
        - A place to put things that don't get finished

- Develop proposals in a deliberate sequence
    - Frame – Learn – Create – Decide
    - Framing is the structure
        - How a decision will be made by who by when
    - Understanding before judgment
        - Understanding happens in "learn."
        - Judgment happens in "decide."

- Address disagreement
    - If the disagreement is in the way, don't pretend you didn't see that
    - First, try to clear up misunderstandings
    - Next, try to identify the underlying interests
    - Last, name areas of agreement and next steps

- Manage conflict
    - Direct conflict toward self
        - Stand in between the adversaries
    - Meet people where they are at
        - Into the tears if they are in tears
        - Into the fire if they are on fire
    - Six steps
        - Pause
        - Stories
        - Feelings
        - Interests
        - Intentions
        - Action

- Provide handouts: paper or online documents
    - So everyone is on the same page
    - So each person can look at different parts of the document at their own pace

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    - Handouts have page numbers, item numbers, and/or line numbers
        - So someone can easily direct everyone to specific words

- Check for alignment and name misalignments for the group to fix
    - Group definitions and boundaries
    - Language, including tense

- When Co-facilitating
    - Define roles clearly in advance
        - Stick to roles or ask permission to deviate
    - Confer and revise strategies during breaks
    - One person lead and one assist, at any one time
    - Support each other publicly

- When facilitating while participating
    - State your role and your views up front
    - Default position: facilitator
        - Let everyone know when you are switching roles and giving your opinion
    - Raise your hand and put yourself in the "line-up"
    - Make process decisions in the best interest of the group

Reflect the group as a whole

Good meeting facilitators reflect the group from a neutral perspective by providing summary statements of what the group has discussed, common themes, and/or agreements. Good facilitators "speak for the group" in a way that all group members appreciate. Written notes are also key to good facilitation, so the group is literally on the same page about what happened. Good facilitators give names to problems and solutions based on what they hear from the group.

Here are some specific techniques, in brief.

- Capture ideas on flipcharts
    - Good when you want to keep the ideas in view
        - Make lists on one chart after another, number them, and tape them on the wall
        - I almost always put my Agenda on a flipchart because I want it in view at all times
    - Write neatly with dark colors.
        - And a mix of colors to make it, you know, colorful
    - Photograph charts and write them up after
        - People love to see their ideas in lasting print

- Capture ideas in a Google Doc
    - Good for online meetings
    - Screenshare and use like slides
    - Share the link address in the chat so remote participants can access it
        - Shorten the URL with a tool like TinyURL.com
    - Paraphrase comments, perhaps organized in a bulleted outline
    - Allow anyone with the link to edit and ask for contributions

- Capture ideas on a projected screen or large monitor
    - Adjust the point size and format to maximize screen real estate
    - Paraphrase comments, perhaps organized in a bulleted outline
    - You might allow anyone with the link to edit and ask for contributions

- Suggest themes/priorities
    - Draft words privately on laptop or on flipchart, so no one is distracted by what you are writing
    - Let the conversation go, write a summary, and then reveal it
        - "Based on what I've heard you say……"
        - "Here's what I think you said – have I got it right?"
        - "Here's what it seems to me are the top priorities based on what you've been saying….."

- "Greenwall" or "Sticky Wall"
    - Write papers with markers and stick them on the wall
        - Move them around as needed
        - Lets us all see all the ideas very efficiently
    - Good for brainstorming
        - Facilitator writes cards or people write their own cards
    - Good for organizing
        - SWOT Analysis in four columns
        - Tasks by team or by person
        - Timeline – historical or planned
    - Can also be done with Post-its or tape or thumbtacks
    - Photograph it and write it up

- Fishbowl / Talk show
    - Pick a few people to represent perspectives
    - Have a facilitated conversation among a few in front of everyone
    - Then open the conversation to everyone

- Multi-vote
    - Give each person 3-10 sticky dots and let them distribute the dots however they like among several choices on the wall
        - Can also be done with markers – give everyone x number of checkmarks

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    - Typically don't use to make a final decision, just to assess current energy/preferences
    - The purpose is often just to see what we should talk about next

- Online survey or poll
    - Ask people to participate by laptop or cellphone and then instantly show the results
    - This is a way to provide solitude and/or anonymity so a person is not distracted by what other people write or afraid to say things attributed to them

- Say it out loud
    - Based on what you've been saying, here's my version of the highlights…..
        - Or "Here's what seems to be the summary."
        - Or "Here's what seem to be the themes."
    - Sometimes I whip out my cellphone and actually voice-record my spoken summary, then write it up later and put it in the notes.

- Prepare written notes and distribute them after
    - This can add tremendous value, especially if done from a neutral perspective
    - Ask for edits/corrections

Encourage participation

Good meeting facilitators encourage participation by creating a comfortable environment, setting a level playing field, and accommodating all personality types and styles. How the meeting is advertised, promoted, and publicized is critical. So is the timing and location. During the meeting, the best idea can come from anywhere and the good facilitator is always trying to bring that out. Attention to the details of inclusive participation results in creativity and innovation.

- Deliberate messaging in advance
    - Clearly articulate the meeting purpose
        - In words and with images that are non-threatening and easily understandable
    - Provide the agenda or otherwise state what people can expect, with timing
    - Sometimes suggest what to wear or what to bring

- Establish facilitator credibility
    - People like to know in advance that a meeting will be well-run
    - In the room right from the start, demonstrate that you know what you are doing; that participants are in good hands

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- Make a comfortable environment
    - People facing each other so everyone can see everyone, if possible
    - Provide food
    - Greet as people as they arrive
    - Sometimes background music or live music on arrival helps put people at ease
    - Help everyone feel that the facilitator is on their side

- Level the playing field
    - Ground rule: some version of “All views welcome”
    - Always looking for the next idea from anywhere
    - Respect for all points of view, no matter what

- Help people get to know each other
    - Provide generous breaks
    - Deliberate introductions
    - Perhaps ask people to line up by tenure with the group or some other demographic factor
    - Line up by some sort of preference or character trait, then talk about it. Ask people to say why they are standing where they are standing.
    - Games or activities specifically to help people get to know each other.
    - Call people by their names in front of everyone else.

- Call on the shy
    - Ask often: “Is there anyone who has not yet spoken on this topic who would like to?”
    - Provide for in-room or online surveys. Provide quiet time for people to consider and write answers to questions.
    - Build in breaks or have an assistant to analyze and provide a summary of results.
    - Design ways for people to make anonymous suggestions
        - A physical suggestion box
        - Online surveys
        - Paper surveys with handwriting transcribed by a neutral, disinterested party

- Card-storming
    - Let people write their own ideas on cards or pieces of paper and then put them up on the wall
    - See “Greenwall” or “Sticky Wall” above

- Small group discussions
    - In person or online
    - Establish roles and ask for volunteers, or assign in advance
        - Facilitator
        - Scribe

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        - Reporter
    - Be deliberate about gathering results of small group discussions
        - Oral reports-outs is one way but rarely the best way
            - Works best when a neutral skilled facilitator is also the reporter
        - Collect data on paper surveys or flip charts or on Google Docs

- Discuss in pairs or threes
    - Provide clear questions and clear timing
    - Ask for shout-outs after: What did you learn?

- Silence
    - Often this is good and not a waste of time. Silence is often under-rated and under-valued in group settings.
        - Allows room for shy people to speak up
        - Allows time for someone to "muster up their courage"
        - Allows time for self-seeking
    - Don't be too quick to break the silence – let it go on
    - Discourage other "talkative" people from breaking silence
        - "Let's give a chance for anyone to speak who has not yet spoken"

- When concerns are not spoken
    - If you have the sense that people have concerns but are not speaking up:
        - Keep asking the same question but in different ways with different words
        - Encourage people to come to you one-on-one during a break or between meetings
        - Collect information via anonymous survey

- Closing Comments
    - At the end of a meeting, allow each person to say a last word: a praise for someone or something, a hope for the future, or a lingering concern.
    - Let people pass if they like.
    - Write the comments and provide them later. Sometimes these comments are SO helpful.

- Round Robin or Talking Stick
    - Go around the circle or around the room and give each person a chance to comment without interruption.
    - Start with someone who wants to start.
    - Sometimes it helps to prescribe an order.
    - You might use a talking stick; a stick that's passed from one to another and one can only talk when holding the stick.

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- Evaluation
    - Provide an opportunity for participants to anonymously evaluate the meeting.
    - Look at the comments. Consider the value of each comment. Make changes accordingly.

Move the group forward

Good meeting facilitators move the group forward by seeing and capturing opportunities. The skilled facilitator is always looking to name common ground, recognize positive reactions, capture agreement, and sometimes even craft proposals — from a neutral perspective — to help the group get resolution. Even between meetings, the facilitator might be listening, nudging, or moderating negotiations toward agreement.

- Address repeated and/or long-winded comments
    - If a comment is clearly being repeated or if someone is going on and on essentially saying the same thing over again in different ways:
        - Validate the comment
            - Let them know that they have been heard and understood
            - Paraphrase back to them their main point(s)
        - State that you want to hear from others
            - It's not about shutting one person down, it's about making space for others to speak up

- Seize forward progress
    - Capitalize on segues as opportunities to move forward
    - When someone suggests moving ahead, even inadvertently, consider doing it.

- Have a next item!
    - Have an agenda with item after item.
    - Don't make it about stopping the current item, but moving to the next item.
    - Or have a next person to call on or a next question ready to ask.

- The facilitator is always thinking ahead!
    - Make yourself a "staff agenda" with notes on how you will handle each item.
    - During any item in the agenda, be reading ahead to the next item so you're prepared to move on quickly.

- When you get agreement, capture it, then move on
    - After the group has agreed to something, there is a danger in continuing to talk about it. It might unravel.

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- Invite and/or make proposals
    - “Does anyone have a proposal for how to resolve this?”
    - “Based on what I’ve heard you say, here’s a proposal for you.”
        - Then show something that you’ve written up or explain your proposal in super-simple terms.
        - Ask, “What do you think?” and revise your proposal on the spot accordingly.
        - Do not be attached to your proposal. It is a gift to the group for them to do whatever they want with.

- Capture agreements
    - Write the actual words.
    - This helps move forward so we don’t have to go back later.
    - Pick up the marker and start writing! Put your hands to the keys and start typing!
    - Write or type in private if you can until the moment is right for the reveal.

- Name leads
    - When tasks are identified, go the next step and identify:
        - Who is lead responsible?
        - By when can we expect something to happen?
    - When you establish a committee
        - Jot a mandate/purpose/charge
        - Name the Committee
        - Name the members
        - Name the convener of the first meeting

- Minutes and meeting reports
    - Written reports are a key part of meeting facilitation. They move groups forward by helping groups to not have to cover the same ground again.
    - You might circulate a draft to participants first and ask: “Have I got it right?” Then revise and finalize.

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