

This is Delegated to the Ones I Love

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CANBRIDGE

a process collective

(Consensus And Network Building, Resolving Impasse and Developing Group Effectiveness)

Laird Schaub • principal

22 Dancing Rabbit Ln • Rutledge MO 63563

660-883-5506 • laird@ic.org

blog: communityandconsensus.blogspot.com

0. Introduction

One of the chronic complaints about consensus (or other inclusive decision-making processes) is that it takes forever. One of the main reasons for this (note I didn't say the *only* reason) is confusion about when and how to delegate effectively.

In this workshop we'll explain the importance of groups getting savvy about what's appropriate use of plenaries (meetings of the whole group), walk through how to create effective mandates, explain when to ask questions about committee work and when to shut up, and how to troubleshoot the two most common troubles with committees: doing too much, and not doing enough.

1. Plenary Worthy

The cornerstone of delegation is clarity and discipline about what topics are worthy of plenary time. If a topic is beyond the scope of the group, the group should not agree to spend plenary time on it at all. If the scope is beneath the group's attention *as a whole*, minor points should be delegated. This becomes a get-out-of-jail card for the group members who don't want to talk about it, and an empowering step for the people who do, as they are now free to work on and resolve their concerns outside of plenary—so long as they operate within the parameters of their delegated authority.

Groups should discuss what constitutes plenary worthy topics. Some things should never be delegated. Examples include:

- Involuntary loss of member rights (in the extreme, this means expulsion)
- Adoption or clarification of common values (determining with sensitivity how two or more conflicting values apply in a particular situation)
- Acceptance of new members (note that many steps in gathering information in preparation for a membership decision *can* be delegated; just not the final decision)
- Adoption of strategic plans
- Approval of the annual budget
- Process agreements for how the plenary will do its work
- Establishment of the rights and responsibilities of members

To be fair, there will be times when it is unclear whether something is plenary worthy or not (or more commonly, which aspects of a topic are plenary worthy and which are not). Where there is no agreement on whether something is plenary worthy, the default should be that it is (in such a case, the group would be well-served to evaluate afterwards whether there is still disagreement about this, or whether there's learning that can be applied the next time a similar topic comes up for plenary consideration).

☞ **Note:** There is an important distinction between someone who doesn't want to talk about a thing, yet who agrees that it is plenary worthy and is willing to abide by whatever the plenary decides, and someone who thinks a topic is beneath the plenary radar and doesn't want to devote plenary time to it beyond setting the mandate for delegation.

☞ **Top Secret:** Groups large enough to have committees at all are well-served to delegate to a subgroup (let's call them the Coordinating Committee, or CC) the task of drafting plenary agendas. In doing this work, the CC should screen everything before allowing it to appear on a plenary agenda:

Screen 1: What, if anything, of this issue is plenary worthy (what would be the objectives of discussing this in the whole group)?

Screen 2: Is this issue sufficiently mature (are all the knowable facts in hand, are background materials organized and ready to hand out, has appropriate research been done, is a suitable presenter ready to go)?

Screen 3: What is the priority for tackling this issue relative to others things that have passed screens 1 & 2 (meetings last a finite time—thank God—and sometimes worthy items have to wait their turn in the queue)?

As soon as you've addressed all issues pertaining to the full group, get that sucker off the plenary floor and move onto the next topic. Either you will have resolution, or are ready to delegate.

☞ **Caution:** One subtle trap that otherwise well-disciplined groups can fall victim to is discussing the below-plenary details of a proposal simply because they're having fun and are on a roll. This can be especially seductive if the group has had trouble getting traction earlier in the meeting. There can be times when it's hard to stop focusing on a thing that's going well because the group is starved for a sense of accomplishment. Meanwhile, the clock is ticking.

2. Mandate Checklist

When delegating, be sure the mandate and authorization are clearly captured in the minutes. Here is a generic list of questions to address in crafting a solid mandate—answer all of the following that apply (cmtee=committee):

—Is the cmtee ad hoc or standing? If ad hoc, will the cmtee be automatically laid down when its mission is accomplished? If standing, for how long will cmtee members serve?

—What qualities are valuable or desirable for people serving on this cmtee (Hint: distinguish between qualities that are important that *someone* has, from those that are important that *all* have)?

—How will cmtee members be selected?

☞ Caution: If the cmtee is doing work that requires balanced representation and/or high trust from members, be careful about just asking for volunteers to fill slots.

—Is the cmtee empowered to self-organize (do you want cmtee decisions to be made the same way that plenary decisions are; are cmtee meetings expected to be open to all group members, or can the cmtee close them—and if so, under what circumstances)?

—Is the cmtee expected to have a convener (the person responsible for calling meetings, drafting the agendas, making sure that minutes are kept and posted, and answering questions about the cmtee)? If so, who will serve as the start-up convener (at least until the first meeting, at which time ongoing responsibilities can be discussed and assigned)?

—What is the cmtee expected to accomplish?

—Are there deadlines for when cmtee work is expected to be completed?

—What resources will be made available to do this work (this can include money, labor, skills, access to equipment and information...)?

—If reports are expected, what are they supposed to address, how and to whom will they be disseminated, and when are they due?

—What license does the cmtee have to make decisions without coming back to the whole? (The flip side: when is the cmtee expected to come back to plenary for additional guidance?)

—To what extent is this cmtee expected to coordinate or share authority with other cmtees?

—Is it clear how group members not on the cmtee can offer input on cmtee topics? Is the cmtee empowered to establish drop dead dates, such that the cmtee is not obliged to work with input arriving afterwards?

3. Minutes

In order for groups to effectively delegate, it is essential that there be a clear and reliable standard for how members will learn what's happened in plenaries and for how committees will communicate what their doing with the rest of the group.

Following are the questions I suggest be addressed in drafting the standards for meeting minutes (both for plenaries and committees):

- o Timeliness—how soon after a meeting do you expect minutes to be posted?
- o How will they be disseminated (is email to the group list serve enough, or should there be a hard copy as well—and if so, where posted)?
- o What are the minimum standards for what content will be covered? (In addition to recording decisions and tasks, how much of the discussion do you expect to be recorded? Keep in mind the need to inform those who missed the meeting in sufficient detail that they'll know whether their input has already come out—if this is not done well enough, you'll be condemned to hear comments repeated.)
- o Do you want to adopt formatting standards so that readers can easily scan minutes for decisions and tasks?
- o By what process can people propose revisions to the minutes, and how will it be decided what changes should be incorporated if there's disagreement?
- o How will minutes be archived?

4. Evaluation & Feedback

OK, suppose your group has gotten religion about using plenary time wisely and you're doing a bang up job of delegating and crafting air-tight mandates for your cmtees. Does that eliminate all the problems? Unfortunately, no.

You have to anticipate that at least some of the time people will be unhappy with what cmtees have been doing. If the person is a cmtee member and is getting no

satisfaction from discussing it in the cmtee, what is their recourse? If the person is a group member not on the cmtee, does your group have an understanding about how cmtees are expected to be available to field questions or complaints?

Just as healthy groups have a clear expectation that members will provide a recognized pathway by which others in the group can offer them feedback about their behavior as a member, there is a parallel expectation for cmtees.

In addition to figuring out how to handle specific complaints, it is wise to periodically evaluate all standing cmtees. This provides the opportunity to do a number of things:

- Celebrate the cmtee's accomplishments!
- Review the mandate (adjusting it as needed).
- Reflect on the composition of the cmtee—is it time to make some adjustments?
- Provide overall feedback about cmtee performance (this is different than addressing an acute issue; here you are looking at patterns of behavior).

☞ **Top Secret:** Cmtee evaluations will tend to go much better if the cmtee self evaluates first and shares a summary of its examination with the group—if there's a glaring deficiency in performance, it will tend to go easier all around if the cmtee offers a *mea culpa* before they're busted by the group.

When cmtees do self evaluations, there are two steps to it:

1. How well is each cmtee member doing his or her job? If there are problems, how will these be addressed?
2. How well is the cmtee as a whole fulfilling its mandate? If there are shortcomings, how will these be addressed?

5. Runaway Committees & Couch Potatoes

Let's look at the dynamics resulting from problematic cmtees—the groups to which the plenary will delegate work. These typically come in two forms. First is the Weak Cmtee (or “couch potatoes”), which doesn't accomplish its work, completes assignments behind schedule, or produces indifferent results. Second is the Runaway Cmtee, which exceeds its authority, and “surprises” the group with its accomplishments. Leaving aside the possibility of malicious intent (which is a real thing, though far less common than accusations would suggest), both of these problems are reinforced by sloppy delegation.

Confusion about the mandate could be at the root of well-intended actions (or inactions) by a cmtee and is a major ingredient in a tried-and-true recipe for hard feelings. And it gets worse. If the group is also not clear about when to delegate (perhaps because they never read page 2 of this handout), it may hold things in plenary too long, contributing to meeting fatigue.

Dynamics of the Runaway Cmtee

A cmtee comprised of can-do members may decide to “streamline” matters as a guerilla antidote to “yet another meeting.” However, when they misread what the group will support, they may get blasted for exceeding their authority (instead of rewarded for their initiative) when the the group discovers what they’ve done. Or the work gets redone in plenary because the group did not lay out clear guidance on what it wanted the cmtee to accomplish. Either way, it’s easy to see how the cmtee could get demoralized (why bother, when the group is just going to spank us or redo our work?).

Next time there’s a call for people to fill a cmtee, they’re chary about putting their hand in the air (once burned, twice shy) and now it’s harder to fill the slots. Maybe the cmtee becomes dormant for lack of enough people to take it on. That means the work comes back to plenary, which translates into longer meetings... and even more fatigue.

Dynamics of the Weak Cmtee

Suppose instead, the cmtee is cautious in the face of an unclear mandate. Perhaps they’ve seen the gung-ho folks get clobbered for taking initiative and they don’t want to expose themselves to that treatment. Every time there’s any shade of ambiguity, the cmtee suspends work until they can get clarification from the plenary (cover your ass syndrome). The cmtee moves at a snail’s pace and the group gets frustrated and impatient with the dearth of product. This teaches the group to not trust the cmtee process. The “product people” may learn the cynical lesson that it’s easier to get forgiveness than permission, and develop end runs around process into an art form. It starts to get ugly.

🔒 **Top Secret:** In addition to providing clear mandates, the trick to effective delegation is giving cmtees as much authority as you can stand, and then getting out of the way. Note however, that delegating does *not* mean that group members have forfeited the right to question whether a cmtee has exceeded its mandate, and there needs to be a clear pathway by which that question can be examined (see section 4).

6. Honoring the Work

If the group has done a solid job of not doing cmtee work in plenary and has provided a clear mandate, then it's important that this good start be followed by an appropriate honoring of the cmtee's work when it returns to plenary.

While it's perfectly legitimate to make sure that the cmtee has operated within its mandate and completed all of its assignments, when the cmtee has done what's been asked of it, that should be recognized and *not reprocessed by the plenary*.

There is nuance here about keeping the conversation focused in the right place. Once the discussion phase of a topic has been completed and a cmtee has been given marching orders about what factors to weigh when coming up with a proposed solution, the plenary should not then reopen the discussion when the cmtee delivers its product. At that point, the plenary needs to have enough self-discipline to talk only about how well the proposal balances the factors already identified.

☞ **Top Secret:** Cmtees can save themselves a lot of grief if they include in their proposals sufficient background on how they arrived at their recommendations that people will be able to see how the cmtee balanced the input it received. It is especially important with input the cmtee does not seem to be embracing, as this will be where people are most likely to feel ignored or blown off. Many people can accept not being persuasive, so long as they are confident that their views were heard and seriously considered.

Once groups get in the habit of honoring the work done by cmtees, you can start to rebuild excitement about serving on them and turn around the negativity described in conjunction with Runaway and Weak Cmtees (see previous section).