

The Essentials of Integrative Facilitation: How to Get Through the Agenda and Build Energy at the Same Time

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CANBRIDGE

a process collective

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

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1. Mind Set

Facilitator ≠ chair ≠ presenter ≠ agenda creator ≠ minute taker

Key questions: Is the group OK with emotional input? Are you?

Be agreement prejudiced; see the glass half full; look for the common ground.

Be everyone's ally; offer different formats.

Remember: it's not about you.

Know what you don't know.

Model an eagerness for new information; be curious.

Work with the whole person.

☒ Top Secret: Make the following question your mantra: what does the group most need in this moment? Then do the answer.

2. Operator's License

What are the group's agreements about the role of facilitator (make sure you know them if you are new to the group)?

Meetings are just like 9th grade: much more likely to go well if you've done your homework.

Use Ground Rules (even if you have to roll your own).

☒ Top Secret: Tell the group what you're struggling with at the beginning and ask for their help—not only will they immediately try to protect you (and themselves in case you stumble), but you'll be more relaxed having admitted your biggest fear and therefore, less likely to have a problem with it!

Sample Ground Rules

- Emotional expression is OK; aggression is not
- If confused about what's happening, ask
- Raise your hand to speak
- I'll try to call on people in the order in which they raise their hands, but may alter that based on who has not spoken recently or to follow a thread
- Silence means assent (at least on procedural matters)
- If the group is undecided about what to do, the facilitator will make the call
- I'm here for everyone

- I'll interrupt people I perceive to be repeating
- I'll keep people on topic
- I'm agreement prejudiced
- Assume good intent
- Please silence all electronic devices

3. Riding Two Horses

A. Working Content

Use a variety of approaches to intermix with open discussion:

- small group breakout
- brainstorm
- fishbowl
- go round
- heart circle
- silence
- guided visualization
- individual writing

Tool kit for shaping content:

- contact statements
- mirroring
- paraphrasing
- summarizing
- groping
- weaving
- partial agreements
- floating proposals
- knowing when to delegate

W **Top Secret:** If you want to develop your ability at summarizing and distilling, volunteer to take minutes; it's the same skill.

B. Managing Energy

- o Feel the undertow
- o No monologues after lunch
- o Name that emotion
- o Glazed eyes and floating teeth (does the group need a

break?)

- o Name that product; up and out
- o Is it stuffy in here (the brain needs oxygen to function)?
- o The trouble with truffles (sweets=crash)
- o Working distress

These two horses need to be in harness and working together. If the group is cantering productively down the road, hold the reins lightly, and let 'em go. If the group is undisciplined (jumping off topic or nipping at each other), pull the reins in and get them back on track. Your Ground Rules are your license to be firm when the group is being cantankerous.

What if one horse is working sweetly and only the other is making trouble? There can be considerable judgment needed in making the right call on how to blend content and energy. An example: if you have a group where members miss meetings (who doesn't?), it's essential to have clear agreements about how you will notify people about what they missed, and under what conditions the group may move forward in making binding decisions in their absence. Even with clear agreements, however, there is a nuance between allowing the group to make progress (essential for morale) and inclusivity (not inadvertently leaving anyone at the station when the train pulls out). The assessment of which aspect needs more attention in a given moment—content or energy—will shift based on the circumstances. In the end, it comes back to the prime directive: what does the group *most* need in this situation?

4. Addressing for Success

It's important to offer an approach to every topic that will facilitate the consideration (remember, that's your role, you're trying to make the group's work easier). You should come to the meeting with a structure in mind.

While there are exceptions to everything (did someone promise you this was going to be easy?), here's a highly serviceable generic sequence:

1. Presentation of the issue (what are the concerns that are appropriate for the whole group's attention?)
2. Questions (did everyone understand what was said and why we're talking about it?)
3. Discussion (this is where the bulk of the work is done and can be a wide variety of things; while open discussion is the most common choice, it is by no means the only format to consider—the object here is to flush out all of the factors that a good response to this issue needs to take into account)
4. Proposal (after hearing all the input, what's our best thinking about what to do about it?)
5. Decision (if you don't find an agreement that wraps things up, identify next steps and go back to where you left off the next time it surfaces on the agenda—*not* back to step one; repeat as needed)
6. Implementation (what are the tasks, deadlines, and budget considerations appropriate for the decision—don't leave the topic until you pin down these essential last details!)

Note that the proposal comes fourth, not first. Many groups insist that something arrive in proposal form before it's worthy of agenda time. (And many groups experience frustration in what gets talked about—don't let that be true of your group.) This is a common trap.

⚠ Words of Caution:

- o Don't get hung up on the difference between step two and three. Be gentle.
- o *Do* get firm about not entertaining potential solutions (step four) before all the input and factors have been flushed out (step three).

Trap: as a group gets rolling, it is often seductive to drift into micro-managing, for the sheer thrill of accomplishing things.

⚠ **Top Secret:** As soon as you have 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.

When delegating, be sure the mandate and authority are clearly captured in the minutes. That is, answer all of the following questions that apply:

—What is the subgroup or manager expected to accomplish?

—When is it expected to be completed?

—What resources will be made available to do this work (it's not just money, it's also access to labor, tools, and facilities)?

—If reports are expected, what are they supposed to address and when are they due?

—What license does the subgroup or manager have to make decisions without coming back to the whole? (The flip side of this is when the subgroup or manager *is* expected to come back to the whole for additional guidance.)

—To what extent is the subgroup allowed to self-organize (make their own decision about how they will make decisions, are they allowed to have closed mtgs, can they add and drop people from the group at their own discretion)?

—By what process can members who are not part of the

subgroup offer input on the subgroups' work?

—Is the subgroup expected to coordinate with other managers or subgroups?

5. Commitment to Relationship

Key moment in meeting dynamics is when two or more participants get into polarized positions. In that situation, the belligerents often ask the group to serve as a jury to determine Truth; that is, to take sides. As facilitator, resist that request and emphasize relationship instead. Your job is to build and maintain a bridge between protagonists, so that information continues to flow.

Facilitator ≠ judge.

Facilitator ≠ arbiter.

Facilitator ≠ therapist.

☒ Top Secret: Develop the skill of being able to translate what one person says into language that others can understand. Hint: in the case of conflict, the way in is through recognizing the emotional experience first.

6. Getting Help

Good to keep the door open to new recruits; bad to play facilitation roulette.

Give people work in line with their ability; assign for success.

If too much to handle the full job, break it down into manageable chunks.

Screen prospective facilitators for content neutrality.

Have a back-up.

Have a buddy watch and offer reflections.

When a topic is hot and someone approximating neutrality is not available in the group, get outside help.

Always have evaluations, to review what participants liked or struggled with. Make them get specific.

Budget resources (time and money) to develop internal capacity. This is a serious skill, folks!

☒ Top Secret: Find out who else in your area uses a similar decision-making format and trade facilitators. You get fresh eyes (and no barnacles) from their people; your facilitators get valuable outside experience. What's not to like?