TREC TOGETHER RISING AS AN ENVIRONMENTAL COMMUNITY

TREC ORGANIZATIONAL DEVELOPMENT RESOURCE

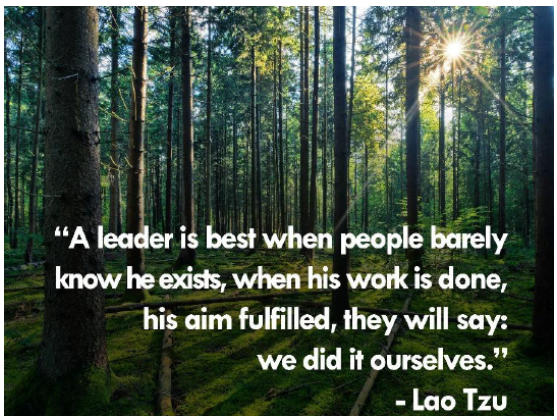
Guide to Meeting Facilitation and Participation

Introduction

TREC encourages groups to self-facilitate meetings because we believe it is an opportunity for everyone to step into leadership and strengthen their team. It is an opportunity to exercise, hone, and grow leadership skills learned through TREC trainings and other life experiences.

This meeting will be as productive and enjoyable as each of you choose to make it. It is everyone's responsibility to contribute to the overall success of time together.

(If you are NOT facilitating, skip to the Participant section on the last page)



Facilitation Guide

Facilitation Job Description and Responsibilities

As a facilitator you are tasked with the following:

Pre-Retreat:

- Clarify your objectives and prepare your session.
- Schedule a time with TREC or a peer to get some support and coaching on your facilitation skills, if needed.
- Create a list of materials and/or space needs for your meeting or session.
- If any pre-work is required, please send to all meeting participants in plenty of time for them to prepare.
- Rehearse your section or run through it mentally a few times.

During Meeting:

- Arrive early to your meeting space to ensure materials needed are there and to do set up, or build time into your agenda to ask the group to make that adjustment with you in the beginning of your session.
- Delegate duties such as note-taking, timekeeping, and vibe watching.
- Create or review your group's shared agreements.
- Facilitate and lead your session, ensuring that it is inclusive, interactive, and informative.

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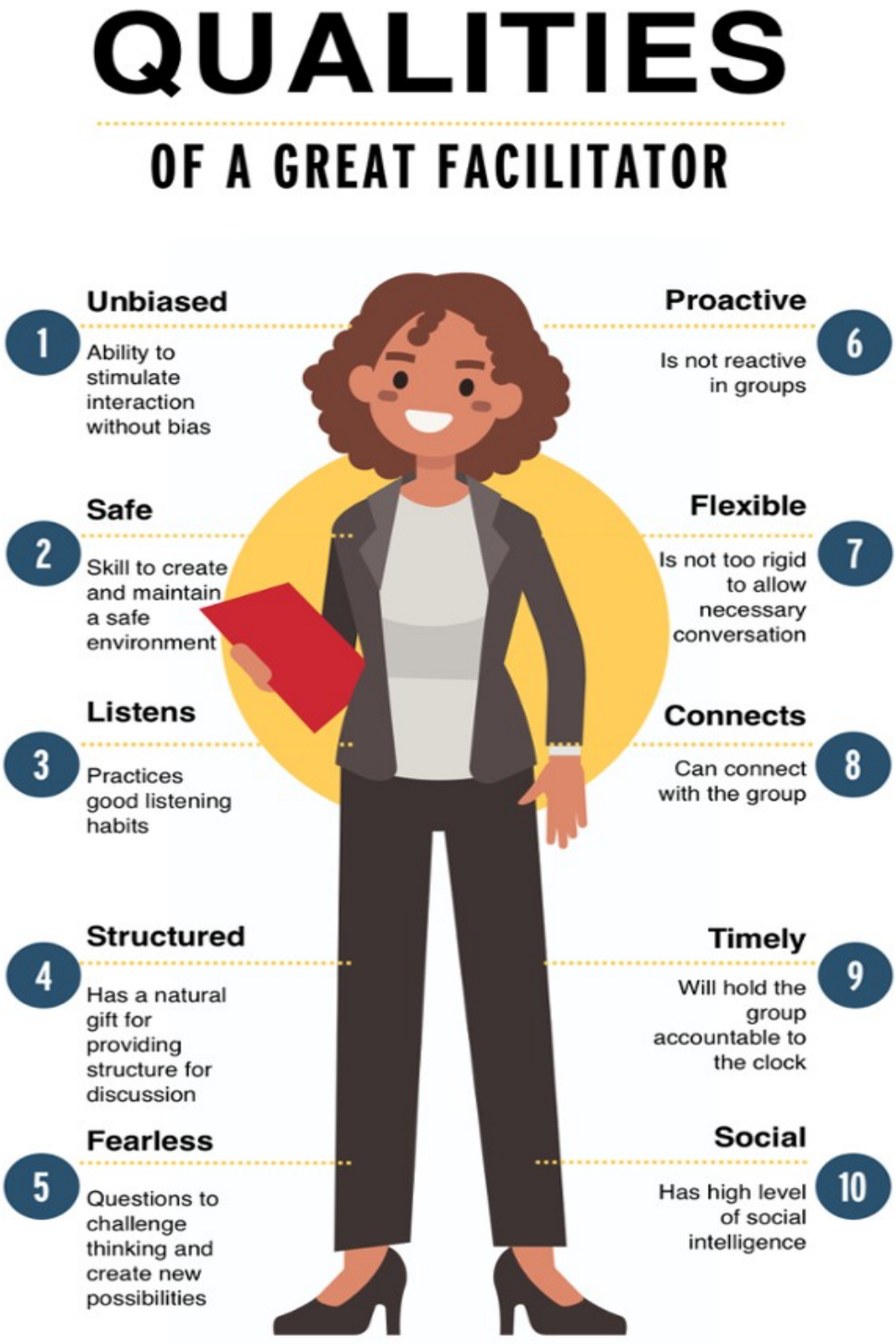
Post-Retreat:

- Solicit feedback from peers to learn what you did well and what you might do differently next time.



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Key Tasks & Roles of a Facilitator

- Supporting the group in honoring the group agreements
- Being a calm, grounded presence
- Acting as a positive role model
- Managing mood and energy of group
- Clarifying and staying focused on the objective
- Gaining group commitment to the objective
- Effectively transferring skills and knowledge
- Drawing out information and stimulate discussion
- Managing group mood and energy
- Building commitment and agreement of individuals
- Keeping the flow going
- Clarifying information or comments
- Identifying problems
- Getting non-participants involved
- Concluding discussion
- Supporting, encouraging participants
- Challenging, confronting when necessary for the good of the order
- Questioning, suggesting, probing
- Summarizing
- Voicing unspoken concerns
- Active listening
- Adapting the agenda where necessary

Be Aware of these Group Problems You May Encounter as a Facilitator

In preparation, think of an example of each of the below pitfalls and how you might handle it, as well as identifying 1 or 2 that might be most challenging for you.

FLOUNDERING:

FIX: Summarize what you've heard and suggest taking a break on the topic and revisit later

UNMOTIVATED GROUP:

FIX: Shift the energy with small break-out group activity, etc.

FIX: Name mood and ask what the issue is, then address (tired after lunch, need bio break, stressful news. etc.)

DOMINANT INDIVIDUAL:

FIX: Remind them of shared agreements and request they withhold additional comments so others can speak

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RAMBLING:

FIX: "It seems you have a lot of thoughts about this. Could you quickly summarize so others have a chance to share their thoughts as well?"

DYSFUNCTIONAL ARGUMENTS:

FIX: Point out that this isn't a productive or generative discussion, summarize any important points and move the conversation forward. You need to take control.

WITHDRAWN MEMBERS:

FIX: Support them one-on-one beforehand to speak up because you want to hear their valuable thoughts

FIX: During a session, stop the flow of people that are eager to talk and say, "I'd love to hear if other folks who haven't spoken yet have something to say." Then pause. If often takes a few moments for some people to speak up. You control the flow.

MEMBERS PUSHING PERSONAL AGENDAS:

FIX: Don't let them take up too much airspace and stay focused on the objective of the session.

EVERYONE TALKING AT ONCE:

FIX: Get their attention through raising your voice a bit over theirs, clapping your hands, moving your body into the space, etc. Name it, request they be more mindful in their sharing, refer to the agreements, etc., and move on. You control the flow.

GOING OFF-TOPIC OR TOO FAR INTO THE WEEDS:

FIX: Name it, restate the objective and redirect conversation. Suggest they talk at another time about the issues you are tabling.

UNFOCUSED MEETINGS:

FIX: Clear topic and objectives. Good preparation and facilitation.

QUESTIONING OF THE GOALS AND OBJECTIVES OF THE GROUP:

FIX: If one person, state how goals and objectives were developed with group input, note their opinion, and stay firm on direction of topic.

FIX: If majority of group, quickly assess if a modification of goal/objectives makes sense, adjust, move forward

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PEOPLE LATE FOR MEETINGS, NOT KEEPING ON TIME:

FIX: Remind folks of shared agreements and explain impact of the behavior on the group and meeting outcomes

TOO FOCUSED ON RUSHING TO GET THE JOB DONE:

FIX: Explain why this topic is important enough to be on the agenda, what's at stake, and slow the pace

UNFINISHED CONTRIBUTIONS OR IDEAS:

FIX: Keep a bike rack for important ideas/issues that don't fit into the topic being discussed

Facilitation Tips and Techniques

The following Facilitation Tips and Techniques provide additional guidance in managing challenging dynamics and facilitating a successful session...

- Techniques to use in meetings:
  - If it is an important topic to hear from many people, go around one at a time for input
  - Have people work individually or in small groups as a way of preparing for a discussion or starting to deal with a difficult topic
- Remind people of group agreements.
- Review the objectives of your agenda topic at the beginning and then bring it back to the objectives as you conclude.
- When appropriate, clarify key take-aways from your section and agreed to next steps.
- Check the mood and energy level of a group at the beginning, end and throughout the section you are facilitating. You have the power to control mood and energy and people are counting on you to manage it. Go off script, when necessary, to address or shift mood and energy so that the group can get the most out of the meeting.
- Track participation and ask for input or opinions from folks not speaking up much. Call out people by name, "Pam, we haven't heard from you yet on this. Do you have any thoughts you'd like to share?" People will usually have something to add, but even if they pass, they will feel recognized and included.
- Conversely, try to minimize participation of people who have already taken up a lot of air space. It is okay to say something like, "I see your hand, and I want to be sure everyone gets a chance to talk. Let's hear from someone we haven't heard from yet."

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- Use the shared agreements to manage distracting or harmful behaviors. As the facilitator, you have permission to stop the session and request the group or individual to honor specific agreements.
- Practice and model curiosity and respect when people speak and share. People are watching you as the leader and many will mirror your behavior and energy.
- Use a flipchart to record ideas as they come up.
- Use a systematic approach for dividing individuals into small groups and ensure that the group composition changes with each new small group activity.
- Ensure that you have the right number of handouts, masking tape, flipcharts and markers, projector and any other necessary equipment.
- Be very clear about what you want from others when leading an activity, asking for input or giving directions.
- End each day with questions/answers and concluding remarks that summarize the events of the session.
- Assume some flexibility in your agenda - it never goes exactly as planned.
- Start the meeting with a clear statement of the objectives, the process, and the outcomes.
- Keep the agenda on track i.e., allow digressions to go for as long as they are useful- then rein them in or point out to the group where it is going and ask for guidance.
- When you talk, ask questions, clarify, or summarize. Constantly test for your audience's understanding.
- Start and finish as close to schedule as possible.
- Summarize at the end of the meeting what has been accomplished and next steps.
- Active listening involves both listening to the words and the meaning behind the words.
- If and when people sound skeptical as to whether their opinion in the organization really does matter and whether their input will be taken seriously, remind them about the amount of time, money and energy that is being devoted to this project.
- Use and maintain a good sense of humor; it energizes the group, increases enjoyment and interest in being in the room, encourages listening and attention, decreases pressure on people to be perfect, increases comfort in groups and promotes the facilitator as an easy-going person.
- Encourage people to discuss issues rather than you jumping in to dominate the conversation.
- When you feel as if you are losing control of the group because there are a

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series of side discussions, stop what you are doing and ask the group to please curtail their discussions while there is a main group discussion going on.

- Whenever you find yourself talking for a while (e.g., if you have spent time discussing the agenda or if you have been offering the group your understanding of the project), stop and ask the group if they have any questions; it allows you to turn the focus back to the group, orients them if they have tuned- out and allows them to discuss any issues that are on their mind.
- Do not be frightened by silence when facilitating a group. Do not feel as if you need to jump in and talk. It is an opportunity for others to talk and you need to let them see that you are wanting to hear from them.
- Laugh with others and not at others.
- Do not impose your own biases on the group.
- Words to remind you of your role as facilitator:
  - Giving directions, setting standards, directing traffic, gatekeeping
  - Explaining, labelling, reflecting
  - Accepting, supporting, encouraging
  - Challenging, confronting, questioning

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Guide to Being a Good Participant at a Self-Facilitated Meeting

As stated at the beginning of this guide, how this meeting goes is a direct reflection of who you are as a group. It will be as productive and enjoyable as each person chooses to make it. It is everyone's responsibility to contribute to the overall success of this time together. Additionally, the facilitators have volunteered to put themselves out there. As participants, we need to do our part, too, to make this retreat a success.

In order to have a successful self-facilitated retreat, participants will need to be responsible for the following:

- Be on time. This means be in your seat and ready to go by the starting time on the agenda.
- Be prepared for each meeting topic. There may be some pre-reading or activities to complete beforehand.
- Limit side conversations. There is plenty of time outside of the sessions to talk one-on-one.
- Remember the objectives of the session and frame your comments to serve them.
- Honor the shared meeting agreements. They should be displayed throughout the meeting, so check them regularly to see if you are living up to them. Are you taking more air space than necessary? Are you working to assume good intentions of others? Are you managing your energy and reactive tendencies? Etc.
- Support the group in honoring the meeting agreements. If you feel the group is being impacted by behavior outside of the agreements, you can and should respectfully and compassionately point it out for the good of the order.
- Stay focused on the topic and bring your full attention to the topic.
- Don't talk over others. Raise your hand, if necessary.
- Be aware of how much airspace you're taking up and make room for others.
- Frame your comments and statements in a way that fosters positive conversation and intention. This can be difficult if you're feeling reactive about a certain topic. Manage your reactivity by taking a few deep breaths and bringing your attention to the feeling of your feet on the ground and your seat in your chair. Wait until you can say what you need to in a calm way that others can hear. There is always time to come back to say something important once you are ready!
- Be supportive and respectful of the facilitators. They need your support through full participation, staying on topic, being on time, and managing your energy and conduct. Imagine what support you would need from the group if you were up there doing this for, possibly, the first time!
- Think about what you say before you say it. Ask yourself:
  - Is what I'm going to say important, and will it add value to the topic and objectives?
  - Am I feeling positive, neutral, or negative right now? If you're feeling negative, take a few breaths until you are composed and can speak calmly and in a positive or neutral way.
  - How much have I already said on this topic? Am I making room for other voices?

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