

## Preface

**S**o, you get to facilitate a meeting! You are working in your job assignment when your phone rings. Your supervisor describes a new team that is forming at your worksite to examine personnel operating procedures and to design a new set of procedures based on the needs of the group. He tells you that you are just the kind of person he is looking for to work with this team and help them be successful in their venture. He describes all the skills you possess and how these skills will help you in working with this team. You reply that you would be happy to work with this group.

After you finish talking to him, you begin to think about the task you have just agreed to. You know that you relate well to others, but running an entire team may be a bit overwhelming. How will you start the process? How will you keep the group on track? What will you do if you run into difficulties? As you ponder these and the other questions running through your mind, you begin to get nervous and have doubts about your ability to be successful in this assignment. You start to wish you had turned down the “opportunity.”

These and many other thoughts run through the minds of people who are asked to facilitate groups in meetings and through decision-making processes. One of the most common complaints among people attending meetings is the ineffectiveness of these meetings and the manner in which the person in charge conducts them. We have all been in meetings where we have felt that our time was being wasted in nonproductive activities or in situations where team members couldn't work together to resolve an issue.

Many people are asked to lead meetings every day with little or no support or direction to help them be successful with the task. With few models of effective meeting facilitation to call on, many of these people are

forced to conduct meetings with limited skills or options. This not only causes a stressful situation for the meeting leader but further reinforces the notion that meetings are a waste of time for participants. When people feel that a situation is nonproductive, their focus and commitment are diminished, causing them to get less accomplished. Now they not only think that meetings are a waste of time, but they have hard evidence in their lack of production to back up their negative thoughts.

Meetings can be conducted in a positive, productive, and efficient manner. Helping you to facilitate good meetings is the major focus of this book. While the facilitation process requires common sense, intuition, and good interpersonal skills, there are also many strategies that, if employed correctly, will enhance what you bring to the group and help make the group successful in accomplishing its designated tasks.

This book has been designed to provide assistance to those who have been charged to help groups of people work together to complete tasks, to generate new ideas, solve problems, or any of the other tasks that may have been delegated to them. It is intended to fill the gap that exists between traditional meeting facilitation and “best practice” in working with others. It also combines the knowledge I have gained in facilitating hundreds of groups and providing training and development to many facilitators over the last 25 years with research-proven psychological principles. While the book contains some theory, it has been designed as a practical guide to the facilitation process that contains enough theory to help the practitioner understand the reasons behind the strategies presented.

With the increased use of processes such as participatory management, community engagement, stakeholder involvement, and advisory councils in organizations, the productive operation of meetings is essential. While there are many sources on the market to deal with the theoretical aspects of specialized meeting components, there are few practical, comprehensive guides to cover the entire facilitation process. This book has been developed to fill that gap.

In the past, meetings were primarily conducted by those in the leadership hierarchy. Today, however, meetings can be facilitated by members from any position in the organization. I designed this book for use by meeting facilitators at any level in the organization. It should also provide assistance to meeting facilitators who are new to the process while giving ideas and extensions for those with previous facilitation experience. The book operates from the premise that the best facilitators are developed by drawing out their individual strengths and building on their base with strategies that match the needs of a particular situation. While the book contains strategies that can be quickly implemented for particular situations, it also serves as a guide for the total skill development of people who

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are required to facilitate multiple groups or engage in the meeting process over a long period of time.

In that spirit, anyone who works with other people can benefit from the strategies presented in this book; formal leaders, employees, parents, students, insiders, and those outside an organization can benefit from the guidance it provides. While the content is focused on strategies to make group meetings more productive, the material can also be used to improve individual working relationships as well. If a facilitator can apply a tactic to a group, using the same idea with an individual is normally not a big challenge. Since the content of the book is based on psychological principles that have been combined in ways that make them effective for group facilitation, they will also work with individuals in isolation. As you read through the material, be thinking about alternate, related applications that could benefit you outside the group facilitation process.

Even though the book was conceived for educational facilitation situations, the content can be applied to any group setting. Because of my extensive experience with educational, business, and not-for-profit organizations, the suggestions in the book can be applied to all of those settings. In order to help the reader with the transfer of the facilitation skills, the content of the book is presented in a generic fashion. Within the examples used for illustrative purposes, a variety of settings are highlighted to assist the reader in visualizing the many possibilities for use of this content. Past workshop participants have used this content to work with difficult groups of people, deescalate emotionally charged situations, confront problem employees, communicate better with family members, and develop personal coaching strategies. They were able to make these accomplishments by internalizing the facilitation material and “live it,” rather than just memorize and use it for one specific situation.

This book is laid out in a manner that parallels the planning and delivery of a facilitative session, but readers should use the book in a manner that makes sense and meets the unique needs they bring to the situation.

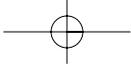
The first part of the book deals with those aspects of the facilitation process that help a facilitator build a strong foundation for the work that is to be accomplished with a group. **Chapter 1** introduces the reader to the facilitation process and the roles and responsibilities of meeting facilitators, and highlights the differences between leading and facilitating groups. This information is foundational in nature and helps set the tone for the service that facilitators provide for teams. In **Chapter 2**, “**Get Ready, Get Set . . .**,” a detailed background in meeting preparation is presented. Strategies and templates are provided to assist in structuring the facilitative environment for success. Crucial first steps in starting off a successful relationship with a group are discussed in **Chapter 3**, “**Go.**” Strategies

and templates are provided that will ensure that those first few minutes with a group are productive and build a positive foundation for the rest of the meeting.

The second part of the book highlights issues related to the facilitation process as it unfolds. In **Chapter 4, “Connecting All Members of the Team,”** readers find active strategies to build community and a sense of interdependence in the group that is working together. Team member interdependence refers to the condition where individuals have a balance between their individual needs and the needs of the entire group. This is a crucial area for the success of any team as it moves forward to tackle complex issues. In **Chapter 5, “Reaching Peak Performance,”** I present practical ideas to diagnose the group’s energy level and then either raise or lower it, depending on the needs of the task. In some cases, groups can move too fast toward solution to think through their options carefully, while in others, the members may need a defibrillator to get their creative juices flowing. In **Chapter 6, “Working the Brain,”** ideas are presented to increase group thinking using brainstorming to deepen the group’s problem-solving capacities. Finally, **Chapter 7, “Reaching the Goal,”** presents ways in which facilitators can ensure that their teams reach their intended outcomes and avoid the pitfalls that normally derail their best efforts.

The third section of this book discusses an area related to special issues in facilitation. **Chapter 8, “Putting on Your Oxygen Mask,”** describes the kinds of strategies meeting facilitators need to use in order to keep their perspective and avoid getting caught up in the emotions that normally accompany the group decision-making process. This is a crucial area for facilitators because they need to find a way to keep thinking and processing while the team is experiencing emotional ups and downs. In **Chapter 9, “Transforming a Difficult Group,”** specific ideas are presented to help turn around problematic situations and help the group get back on track toward its assigned tasks.

The role of a facilitator can be exciting as well as challenging. In the end, you provide a valuable service to the group you are facilitating as you work to make it successful in its assigned tasks. I hope you find the resources contained in this book interesting as well as helpful to you as you work with groups as a facilitator. I have tried to organize it to help take some of the stress out of the role. If you are performing your job well, your group members may think that what you do looks easy. The completion of their task and the ease with which they are able to accomplish it are two indications of a successful facilitation experience. This book represents an ongoing journey into the world of helping facilitate teams to work at their



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maximum capacity. I welcome your feedback, thoughts, reflections, and stories. Please feel free to contact me at [jellerthree@aol.com](mailto:jellerthree@aol.com). I can't respond to every e-mail, but know that I will continue to grow and learn from your experiences in the field with real people and situations.

