

Deliberative Improvements: Facilitation Techniques for Meeting Success

BY THANE JOYAL AND LESLIE WATSON

From a director's perspective, what are the core ingredients of a great board meeting? Starting and ending on time probably top the list for most people, followed closely by everybody arriving prepared to do work that's worth doing. A bit of dinner or at least a communal bar or two of chocolate, shared in a comfortable and welcoming space, can also be a make-or-break factor.

A thorough meeting checklist would also include what is tougher to articulate, something like an opportunity for all voices and perspectives to be heard at the right volume, focus, and duration. An agenda provides structure; preparation sets the stage; chocolate lends energy and a bit of bliss. But the chief tool for a board's work is conversation, and excellent facilitation is necessary to wield it effectively and well.

So, how to ensure good board conversations? For directors interested in better meeting facilitation, a great place to start is *The Facilitator's Guide to Participatory Decision-Making*, by Sam Kaner and his colleagues Lenny Lind, Catherine Toldi, Sarah Fisk, and Duane Berger (now in its third edition: see "Resources"). Kaner, et al. start from the premise that, at its heart, a facilitator's job is to "support everyone to do their best thinking" (Kaner, 32). To achieve this, say the authors, facilitators must serve four essential functions:

- encouraging full participation,
- promoting mutual understanding,
- fostering inclusive solutions, and
- cultivating shared responsibility.

Both translator and mediator

Kaner, et al. further note that in diverse groups, a facilitator can act as both translator and mediator, helping group members to hear one another. A careful facilitator should be alert to the dynamics in the room and can use a wide range of facilitative devices both to listen well and to support participants in hearing themselves and others. *The Facilitator's Guide* details a number of such devices, several of them particularly helpful in a meeting context:

Paraphrasing is a strategy that helps people to feel that they are being heard and to hear how their comments or suggestions sound to others. By restating and summarizing the speaker's comments—and, critically, checking with the speaker to make sure the restatement is correct—the facilitator can help to clarify issues while building trust with the group (44).

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Drawing people out with open-ended questions is useful when people are struggling to express their ideas clearly; it can help both the speaker and the listeners to better understand the intended meaning. It involves paraphrasing, followed by questions such as "Can you tell us more about that?" and "Can you share an example?" (45).

Balancing can transcend the tendency for discussion to follow from the first or loudest voices, and draw the full range of perspectives into a conversation. It can

also help a group become unstuck from two polarized positions. To balance, a facilitator intentionally creates space for silent voices to emerge by asking questions such as, "We've heard two positions on this topic—are there others?" or, "Can someone play devil's advocate on this?" (51).

Listening with a point of view is a vital skill where the facilitator is also the group's leader, as is often the case with co-op boards. It allows a facilitator to navigate the dual roles of conveying his or her own thinking while still supporting others to do their best thinking. In careful steps, the facilitator states his or her own opinion, then asks for reactions and responds to participants' comments from a facilitator's standpoint, using all the skills of active listening, drawing people out, and so on. The facilitator who also has an individual point of view should spend at least twice the amount of time on others' comments, to balance the inherent power of his or her role (59).

Varying formats and techniques

Paying attention to the vibe and employing listening skills are always important ways to support groups in their dialogue. Additionally, on some topics, setting aside a group's traditional discussion format can inject fresh energy and spur better thinking.

Of course, changing up the format just for the sake of novelty is unlikely to create value and can even be counterproductive. But a skilled facilitator should have a repertoire of discussion formats and techniques at the ready, to deploy wisely when the group needs to approach a subject in a fresh way, to make room for disruptive thinking, or to create space for voices that might be struggling to be heard. *The Facilitator's Guide* suggests many options: open discussion, structured discussions or go-arounds, small groups, paired dialogue, and individual written reflection are just a few of the many ways to engage as a group.

Liberating structures

Another good resource for fresh facilitation approaches is *The Surprising Power of Liberating Structures*, by Henri Lipmanowicz and Keith McCandless. In both their book and their open source website, the two authors embrace a comprehensive philosophy around the potential for well-structured facilitation to radically improve how people work together. Their approach embraces accessibility and is steeped in the belief that anyone can facilitate effectively given sound design and explanatory guidelines.

Lipmanowicz and McCandless offer a repertoire of new and familiar facilitation approaches for different applications, with clear explanations and step-by-step instructions. Here, we summarize just a few of their strategies that can be useful in the board room:

1:2:4: All This brainstorming technique can engage the full group on a question or issue while making space for quieter voices. It is a fast and efficient way to quickly uncover shared and divergent priorities or perspectives. The technique involves having individuals jot down all responses, burning questions, and ideas for one minute on their own. The facilitator directs them to turn to a neighbor and compare responses for two minutes, then debrief with another pair for four minutes. Finally, each foursome shares one idea, response, etc., at a time with the full group, with no repeats, until everyone agrees the list is complete.

W3 – What, So What, Now What? This simple series of questions can help a group to process a shared experience, reflect on new information, or clarify the current reality preparatory to taking action. It involves asking the group to move through three steps in sequence: (1) “What happened? What did you notice or hear? What stood out? (2) So what? Why does it matter? What patterns are emerging? What sense do we make of this? (3) Now what? What actions should we take, based on what we’ve discerned?”

TRIZ This technique allows a group to acknowledge and analyze counterproductive activities and behaviors, and come up with an action steps for improvement through a form of “reverse engineering.” In a three-step process, the facilitator asks the group to first make a list of everything they could do to ensure the worst possible outcome for a given issue or challenge. Next, the group reviews the list and, with total candor, identifies anything that they are currently doing that resembles things on the list. In the final step, the group identifies strategies for avoiding or transcending these actions and outcomes.

Remember that while “best practices” often reflect learned wisdom over time that has worked for many, a practice is only “best” if it’s a good fit for your group’s culture and needs at any given time.

Planning for success

Planning is a big part of a good facilitator’s job. Great facilitation starts before the meeting, with an agenda that allots the appropriate amount of time, identifies desired outcomes (listen and learn, discuss, make a decision, etc.), and chooses the right facilitation approach depending on the group’s needs and the goal. Indeed, deciding which discussions to have when, and how to structure them, is as important as deciding how to have them. Regular monthly agenda planning meetings with the CEO/general manager and

the board leaders (or designated small group) that dig into both content and meeting design are a common and effective way to accomplish this in a manner that draws upon group wisdom.

Consider using a calendar or workplan tool that gives the board a long-term view of how different conversations will proceed over time. Sequencing discussions, with the help of the group, and then helping the group to remember which discussions are occurring at which point in the sequence are both important to successful facilitation over time. With a lapse of a month or more between board meetings, it’s reasonable to spend time looking at the overall plan, and refreshing the group concerning any recently made or upcoming decisions, so that there is shared context for every conversation.

Final points

While we’ve described the facilitator as a board leader, the board chair doesn’t actually have to be the one to facilitate the meetings. Some co-ops choose to have an outside facilitator, who can bring professional skills and a neutral perspective to the job while freeing everyone on the board to participate fully. With mixed success, a handful of co-ops choose to rotate facilitation duties among directors, as a way to build facilitation skills and leadership among the entire group.

No matter who leads, successful meeting facilitation is never the sole responsibility of the designated facilitator. Everyone at the table is responsible for participating fully, abiding by norms, and helping to find solutions when things go off the rails.

Finally, remember that while “best practices” often reflect learned wisdom over time that has worked for many, a practice is only “best” if it’s a good fit for your group’s culture and needs at any given time. By embracing a practice of regular reflection and evaluation, your group will learn to recognize when to adjust or refine meeting practices to reach better outcomes.

Even seemingly simple changes can have profound effect. At Whole Foods Co-op in Duluth, Minnesota, the board concludes its meetings with the following reflective questions:

Divergent Conversations: Working Through the Groan Zone

Attention to format and dynamics is never more important than when conversations and decision-making processes are complex or messy. One of the most important insights offered by *The Facilitator's Guide to Participatory Decision-Making* (Kaner, et al.) is that it is normal for a group seeking to come to decision to have one or more wide-ranging, divergent conversations before the group will begin to focus the discussion and eventually converge on a potential resolution. The authors colorfully and accurately label that wildly divergent phase of the conversation “the groan zone.” Depending on how an individual experiences group process, individual board members may find that stage tremendously stimulating but simultaneously quite frustrating. It’s helpful for facilitators to acknowledge and validate these responses to the groan zone!

- Did everyone get to speak who wanted to speak to a particular issue?
- Have we heard the opinion that challenges the wisdom of the day on this issue?
- Have all opinions been heard—especially those not present in the room?

These questions serve as a reminder of the goals the group has set for its discussions and allows the group the opportunity to reflect, learn and grow.

Board service is rewarding when it provides directors with new ideas and skills. Whether leading or participating, directors can deepen their deliberations and enjoy their meetings even more by serving up fresh approaches to facilitation alongside their monthly chocolate bar.

See you at the co-op! •

Resources

“A Recipe for Good Board Meetings,” by Michael Healy, CG 146 (Jan.–Feb. 2010).

The Facilitator's Guide to Participatory Decision-Making, 3d ed., by Sam Kaner, Lenny Lind, Catherine Toldi, Sarah Fisk, and Duane Berger (Community at Work, 2014).

The Surprising Power of Liberating Structures: Simple rules to Unleash a Culture of Innovation, by Henri Lipmanowicz and Keith McCandless (Liberating Structures Press, 2013); see also the authors' website at liberatingstructures.com.

“Your Best Meeting Ever,” online webinar with Michael Healy and Mark Goehring of CDS Consulting Co-op, <https://library.cdsconsulting.coop/your-best-meeting-ever/>

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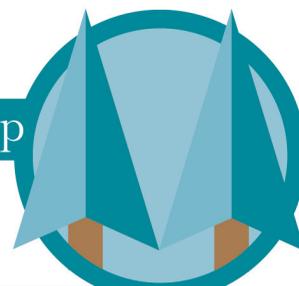


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