

## TRICKS OF THE TRADE

*Simple (but easier said than done!) advice for having better meetings*

Adapted from Active Neutrals and the Consensus Building Institute

### THE MEETING ARC: NORMS – ASSESS – AGENDA – CONDUCT – FOLLOW-THROUGH

#### NORMS

“Bad” behavior can often be prevented by having established and respected standards or expectations. These may be indigenous to the organization or the collaborative group (norms), or established for the specific meeting or task at hand (ground rules).

Examples of norms → Identity and culture of group:

- Decision rules (majority, consensus, etc.)
- Participation expectations (RSVP, be on time, no cell phones, etc.)
- Representation (speaking on behalf of institutions or just there as individuals, etc.)
- Expectations of preparedness
- Behavioral norms
- Roles (what does it mean to be the facilitator, participant, presenter, etc.)

Examples of ground rules → More situational, more for “one-off” meetings or task-oriented:

- Share air time (No one speaks twice until everyone speaks once, or “step up, step back”)
- Speak from your own perspective
- Write down questions and hold them until the end
- Raise your hand

#### ASSESS

An assessment can be as simple as a couple of phone calls, but it is not a step to be skipped. The design of the agenda as well as the success of the facilitation of the meeting depends on information that is gathered through the assessment.

- Establish purpose: Why do you need to talk to people?
- Who are the right people (stakeholder assessment), and how can you engage them?
  - Resource limitations
  - Types of engagement: 1-on-1 interviews, in-person, by phone/videochat, focus groups, surveys, etc.
- What are the right questions? Examples:
  - What does this group need to accomplish in this meeting?
  - In addition to accomplishing your primary objective(s), what else would make this a successful meeting?
  - What do you like about how this group works?
  - What do you hope for this group’s dynamics and performance in the future?
  - What is the facilitation support that you feel is most important for this group to receive in order to be productive?
  - What are the norms/rules of the group?
  - What are this group’s strengths? What are their weaknesses?
  - What is the history of this group? Are there any significant relationship dynamics that should be tempered or leveraged?

## AGENDA

We have all been subjected to meetings that lack a solid agenda. Often the discussion veers off topic, decisions and action items get dropped, and productivity can be diminished. But designing a good agenda takes skill and practice. Here is some advice to help with the process:

- Focus on interests
- Draft the agenda with enough time for a review from appropriate people and revisions.
- Think about flow:
  - 1) **Opening:** objectives, introductions, ground rules, review action items from last meeting, overview of this meeting
  - 2) **Middle:** substance and decision-making
  - 3) **Closing:** review of key decisions and next steps
- Consider tone: When fun? When solemn?
- Consider variety in type of activity: Mix of presentation and interactive elements (in dyads, trios, small groups, and full group)
- Match activity type to purpose: interactive activities when generating ideas, reflective activities when making decisions, etc.
- Anticipate what may go wrong (predictable surprises) and plan some flexibility into the agenda to deal with them.
- Draft a facilitator's agenda and a participant agenda

To adequately prepare to facilitate a meeting, you need to worry about two things: substance and logistics.

### Substance

To get the right substance, assess what the meeting participants need to get out of the meeting. Some example questions the facilitator should be able to answer are listed above under "Assessment." If the facilitator cannot adequately answer these and other key questions, she or he needs to talk to other people to get the answers (the convener, the participants in the meeting, etc.). The agenda design should be informed by the answers to these questions.

### Logistics

- Notification (agenda sent in advance, participants know what they need to do to prepare, RSVP?, etc.)
- Meeting space (size, tables/chairs, configuration of tables/chairs, temperature, lighting, food allowed, unlocked doors/informed doormen, whiteboards/walls you can use with tape, etc.)
- Materials and equipment (A/V, paper or digital copies of meeting materials, flip charts, markers, etc.)

## CONDUCT

What is my job as a facilitator and how do I do it? Some considerations:

- Role (and role switching)
- Opening the Meeting
- Middle (Substance & Decision-Making):
  - Listening triangle
  - Building agreements by consensus
- Closing the meeting

## Role Definition and Role Switching

Facilitators are also often parties at the table with their own interests and goals. It is important to know when to play the role of facilitator, when to play the role of participant, and how to switch between them.

- Define roles up front both in norms conversation and at the start of the meeting (i.e. facilitator, representative, expert, observer, citizen, etc.)
- Be transparent about role switch. Say “I’m going to take off my facilitator hat for a minute and put on my [other] hat to say...”
- Can’t have it all – may have to make a choice to let one role go in favor of another.

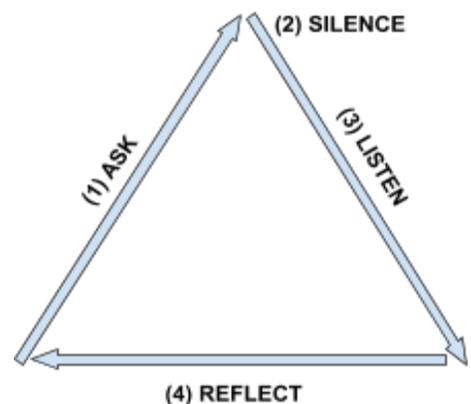
## Opening the meeting (review)

- Introductions
- Objectives/Overview
- Norms & Ground Rules
- Review Action Items

## Listening Triangle

A crucial tool to help understand the interests behind someone’s positions.

- 1. Ask open-ended, non-leading, non-judgmental questions,**
  - a. “Why are you interested in X?”
  - b. “What is important to you here?”
  - c. “Tell me more...”
  - d. “What else?”
- 2. Listen for interests**
- 3. Reflect back what you’ve heard and understood.**
  - a. Mirror - repeat exactly what they said
    - i. Helpful if they are really upset
  - b. Paraphrase - say what they said in your words
    - i. Helpful to make them feel heard
  - c. Reframe - reframe around their interests
    - i. Helpful to get past their positional stance



## Building Agreements by Consensus

Following some simple steps can make a big difference.

- Do a straw poll when you sense energy building around an idea
- To find consensus:
  - State the emerging agreement →
  - Ask “who can’t live with this?” If anyone, ask for suggestions for improvement →
  - Revise and restate →
  - Repeat until everyone can live with it.

## Closing the Meeting

It’s not over ‘til it’s over. Leave time and make arrangements using notetakers or technology to skillfully review action items, decisions and agreements, and next steps. Closing can also be a good time to do final reflections, evaluation (such as roles and tensions) and celebration.



## FOLLOW-THROUGH

A key responsibility of the facilitator is to make sure the purpose of the meeting is fulfilled. This often happens in the work between meetings, which also requires facilitation.

- Notes (quick turnaround is better than perfect notes)
- Separate the action items at the top of the notes
- Remind participants of commitments
- Celebrate: acknowledge when tasks get completed
- Evaluation: (can lead to Assessment)

## Sample Agenda & Meeting Notes:

Time	Notes	Outcomes/ Action Items
<b>1. Opening &amp; Check-in</b> Start Time-End Time [Time allotted]	1. Opening <ol style="list-style-type: none"> <li>Introductions</li> <li>Objective &amp; Overview of meeting</li> <li>Ground Rules/Norms</li> <li>Review Action Items from previous meeting</li> </ol> 2. Check-in (Optional)	
<b>2. Agenda Item</b> Start Time-End Time [Time allotted]	1. Review purpose and expected outcome of Agenda Item 2. Provide context if needed 3. Discussion <ol style="list-style-type: none"> <li>Action Items highlighted</li> </ol> 4. Make decision or close out item	<b>Expected Outcomes:</b> - Decision to be reached - Discussions to be had - Tasks to be assigned  <b>Action Items:</b> - Person responsible: Task - Deadline
<b>3. Closing</b> Start Time-End Time [Time allotted]	1. Review of decisions made 2. Process forward/Next Steps 3. Planning next agenda 4. Evaluations 5. Ritual/Close-out	

# DEALING WITH CHALLENGING SITUATIONS

What do you do when someone is:

- being irrational?
  - Treat them as if they are being rational. Ask, “Help me understand how [X behavior] will help you get what you want.”
- angry?
  - If you are at fault, apologize.
  - If you are not at fault, or you are not sure, say, “I can see this is upsetting to you. I would like to make things better. Is there anything I can do, or we can do together?”
- repeating himself or herself?
  - They need to know you have heard them. Say, “I want to make sure I have heard you. Let me try to say it back to you.” Then say it, and ask, “Is that right?...Is there anything else?”
- dominating the group?
  - If you have ground rules that refer to “sharing air time,” find a neutral time (perhaps right after a break) to remind everyone of the expectations.
  - Say, “I would like to hear from 2 or 3 people who haven’t spoken much. Let’s all give them some space to weigh in.”
  - Activity where there is not speaking. (E.g. Journal, gallery walk, spectrogram, body check)
  - Give participant a certain number of pennies and every time they speak they have to give their “2 cents”
  - Time out
- disengaged?
  - Ask them a direct question that only they can answer – something important to the discussion that demonstrates their contribution makes a difference.
  - On a break or another time when you can have a private conversation, tell them you have noticed they seem disengaged and ask them why. “It seems like this meeting is not working for you? Can we do anything differently to draw you in?”
- off on a tangent?
  - Be transparent and light-hearted if possible. “I’m sure everyone here would rather talk about [tangent topic] than [agenda topic], but since we all want to get home at some point, let’s try to get back on track.” Then follow-up immediately with a specific topic-appropriate question.
  - Interrupt with kindness and curiosity. “Forgive me for interrupting. What you’re talking about is interesting, but I’m not getting the connection to [topic]. Can you help bring it back to that?”

How to:

- Think on your feet
  - Be prepared. There is no substitute for having a deep well to draw from.
  - Don't. Ask for a break or for some time to consider and come back to the group.
  - Practice builds confidence.
  
- Redirect a negative comment
  - Acknowledge and provide a different point of view. "I hear what you're saying. There is another possible perspective here that might suggest..."
  
- Reframe something unclear or negative
  - Say, "I want to make sure I understand," then restate with small changes in vocabulary, tone. Ask for confirmation that you got it right.
  - Use "and" instead of "but." For example, "It's an interesting idea, and I want to add this thought..." instead of, "It's an interesting idea, but I want to add this thought..."
  
- Be agreeable without being walked over
  - Pair your views with an objective or agreed upon standard to "de-personalize" a contrary view and offer an acceptable alternative: "I wouldn't be doing my job very well if I agreed to [X offer/opportunity], but I am willing to lay out a few options that would work for me."