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# **Effective Facilitation Skills:**

## **THE MEETING EXPERIENCE**

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2019 Board Officers' Academy

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## Guidelines

- Participate
- Be brief and to the point
- Listen with respect
- One speaker at time
- Keep the discussion focused on the agenda item
- Take care of yourself

## Effective Board Meeting Discussion

- Stays on agenda item
- Follows Open Meetings law requirements
- All members may speak and are heard
- Agenda item objectives are met on time

## Effective Facilitation Encourages

- Participation
- Ownership
- Productivity

## **Board Chair's Job as Facilitator**

Ensures:

- Each member has equal opportunity to speak; be heard
- Discussion complies with Open Meetings laws
- Agenda is completed on time
- No one does any harm

## **Facilitation Tools**

- Prevention
- Intervention

## Basic Prevention Techniques

- 1) **Educate self and team:**
  - Robert's Rules of Order or your board-adopted parliamentary procedures.
  - Chair's "meeting leading" responsibilities.
  - Facilitation tools the chair will use and how.
- 2) **Know and use policies, especially those related to board meetings.**
- 3) **Gain agreement on team procedures related to board meetings, including agreed upon *Guidelines for Team Discussion*. Remind members of team agreements regularly.**
- 4) **Stay as neutral as possible:**
  - State your point of view, if necessary, after other members as encouragement for open discussion.
  - Allow all members to have an equal opportunity to share their points of view.
- 5) **Be prepared:**
  - Know when topics are "hot" and have interventions ready if they are needed.
- 6) **Know your personality style and be ready to adjust how you respond in support of effective team discussion.**

## Basic Intervention Techniques

### 1) Return a question to the individual or the team

**Situation:**

Member asks a question of the chair that can/should be answered by the team.

**Sample language:**

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*“Mary asked if this is a critical issue. What do the members of the board think?”*

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### 2) Stop discussion and provide direction to focus board on the same content or process step

**Situation:**

Discussion is on the data that explains a problem. Problem may not be fully defined, yet team members are suggesting solutions to the “assumed” problem.

**Sample language:**

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*“Just a moment, we are still discussing the data the superintendent has prepared on this issue. Does anyone have any other comments about the data before we move to the recommended options?”*

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### 3) Ask/say what is going on

**Situation:**

Members comments are repetitive.

**Sample language:**

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*“We are repeating ourselves... Does anyone have a different point to make? Or, may we move on?”*

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## Basic Intervention Techniques (continued)

### 4) Remind the team of agreed upon guidelines

**Situation:**

Team/team members are breaking the teams' discussion agreements.

**Sample language:**

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*"We agreed to allow one person to speak at a time. Joe, please speak first, then Mary and then Jon."*

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### 5) Accept – Legitimize – Deal With – Defer

**Situation:** A member or members suggest something different to the team which can be content or process oriented.

**Sample language:**

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*"Henry suggests an alternative approach. What do the rest of you think?"*

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### 6) Diffuse

**Situation:**

Discussion is getting "heated" and is threatening to erupt into an argument. Team members are breaking the teams' discussion agreements.

**Sample language:**

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*"I think it would be helpful if we took a short five-minute break. Do I hear any objections? (pause) Hearing no objections, we will take a 5-minute recess."*

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## Interfering Behaviors: Tip Sheet

There are a variety of ways a facilitator might prevent problems or intervene when problems occur. How and when will depend on the facilitator's style, his/her knowledge of the group, the actual situation, the environment and so forth. Below are some sample interventions for typical team situations. **While the "ideal" is to provide preventions before interfering behaviors occur, in reality, prevention techniques may be the first level of intervention.**

### I. A Team Member Dominates Discussion

#### A) Preventions

- 1) State upfront that you are going to give each member the opportunity to speak once before you allow any team member a second opportunity.
- 2) Tell the team that you will call for supporting points of view and then opposing points of view in order to allow all points of view to be heard.
- 3) Ask the team to agree on time limits or other procedures for discussion that will ensure equal speaking opportunities.

#### B) Interventions

- 1) Note that the "dominator" has spoken once or several times, and others need to have equal opportunity.
- 2) Restate the team agreement about allowing "equal voice", and call on others who want to speak.
- 3) Encourage equal participation by calling on other team members to speak.
- 4) If necessary, interrupt the "dominator" and grant the floor to another member.

### II. Team Members Are Reluctant to Speak

#### A) Preventions

- 1) Let members know in advance that you will be calling on each member to speak, and that each has the right to decline.
- 2) Visit with the "quiet" member and build a relationship. Find out what you can do to support them in responding more often.

#### B) Interventions

- 1) Remind members that all opinions are desired and valued. Model behavior that is consistent with that statement.
- 2) Invite specific members who have not spoken on an item to do so.
- 3) Be sure that you allow equal opportunities to speak.
- 4) Call on the member who needs "thinking" time after those who are ready to respond immediately.

## Interfering Behaviors: Tip Sheet (continued)

### III. Discussion Flounders

#### A) Preventions

- 1) Suggest a team training goal to study how the team can improve meetings, including effective discussion ideas.
- 2) Train new board members about team member meeting responsibilities and ethics.
- 3) Explain your facilitator responsibilities to all team members.

#### B) Interventions

- 1) Summarize key points and ask if there is further discussion.
- 2) Refocus attention on the action needed on the agenda item and ask if members are ready to take that action.
- 3) If members cannot reach a consensus or do not appear ready to vote, suggest a postponement.
- 4) Bring the discussion to a close by asking for a vote when:
  - ◆ All members have been heard and nothing new is being added to the discussion.
  - ◆ Discussion is repetitive.
  - ◆ There appears to be group consensus, but the members continue to talk.

### IV. Discussion Moves “Off-Topic”

#### A) Preventions

- 1) Get training for new board members in the “what”, “why” and “how” of the Open Meetings law.
- 2) Explain your role as meeting facilitator and how you will ordinarily address this issue.

#### B) Interventions

- 1) Call attention to the wording of the agenda item and ask the speaker how the current topic relates to the stated agenda item.
- 2) Remind members of the step or issue under discussion.
- 3) Ask the person who is “off-topic” to hold his/her questions or comments until the time when future agenda topics may be suggested.



## Interfering Behaviors: Tip Sheet (continued)

### V. Members Attack Each Other

#### A) Preventions

- 1) Know “hot” items. Be prepared for how members might react.
- 2) Have team develop agreements about member behaviors in a group discussion.
- 3) Keep group discussion agreements **IN FRONT** of team.
- 4) Remind team of agreements at the beginning of each meeting.

#### B) Interventions

- 1) Interrupt the speaker(s) and redirect the comments to a statement of the facts related to the agenda item.
- 2) Remind members of any appropriate team agreements.
- 3) Remind members to address each other with respect and courtesy at all times, even if disagreeing.
- 4) Diffuse the situation by halting the discussion and calling a brief, timed recess.
- 5) Diffuse the situation by calling on another speaker.
- 6) If “personal” and off-of-agenda,” **STOP** discussion and refer members to the agenda item.

### VI. Board Member Comments Are Bogged Down in Administrative Matters

#### A) Preventions

- 1) Educate the board that items for board discussion and debate should be restricted to the board’s “governance and oversight” authority:
  - ◆ Goals and their evaluations
  - ◆ Policies
  - ◆ District systems and the district system results
- 2) Conduct local training about the board’s role in oversight of management and legitimate board questions.

#### B) Interventions

- 1) Remind members that it is appropriate to ask “oversight” questions about administrative reports, such as:
  - ◆ *“How does this recommendation help the district accomplish our vision or our goals?”*
  - ◆ *“What is our policy on this subject?”*
  - ◆ *“How will this recommendation be monitored and evaluated?”*
- 2) Restate the board member’s comment in the form of a legitimate oversight question.

## Interfering Behaviors: Tip Sheet (continued)

### VII. Disruptions from Audience Members

#### A) Preventions

- 1) Provide policy 2300: Board Meetings and/or policy 2310: Public Participation.
- 2) Read policy 2300: Board Meetings and/or policy 2310: Public Participation.
- 3) Periodically review policies and any related team agreements or procedures to ensure alignment and agreement.
- 4) Remind the audience that it is the board's meeting and state that they are welcome to stay and listen as long as they do not disrupt the meeting or interrupt those who have the floor.

#### B) Interventions

- 1) Remind the audience that this is the board's meeting and that you will not tolerate further disruptions.
- 2) If necessary, share policies 2300 and 2310, [Disruptions].

### VIII. Board Member Responds to Speaker during Public Comment

#### A) Preventions

- 1) Educate the board about legalities connected with board member discussion during public comment
- 2) Tell the board what interventions you will use if they are to respond to a speaker during public comment

#### B) Interventions

- 1) Interrupt the board member and briefly remind him of guideline or procedure about board members responding to speaker during public comment: "Mr. J., no board discussion during public comment."

## Guidelines for Group Discussion: Example

### Purposes

- To ensure that every member of the team has the opportunity to speak and to be heard
- To ensure that the team accomplishes its mission in the time allotted

### Guidelines

- Allow equal voice
- Listen to understand and with respect
- Allow one speaker at a time
- Ask rather than assume
- Be brief and to the point
- Keep discussion to the agenda item

## Conflict Management Options

Conflict is natural in all groups. It is healthy when it is dealt with constructively, and when groups use it to explore new ideas, to increase understanding of each other and to test their beliefs and positions. In responding to a conflict situation, the board chair's **key consideration is the team and the accomplishment of its mission through effective working relationships and team tasks**. The board chair has several options for addressing conflict on the team. Depending on the situation, the board chair may use one or several **options** during one event. Some options are provided below:

### A) Avoid

- 1) Do not comment on disruptive behavior
- 2) Avoid making any intervention at this time
- 3) Stay observant of member behaviors for possible escalation
- 4) Continue to equitably guide the board discussion

### B) Defuse

- 1) Do not comment on disruptive behavior
- 2) Call for a brief break **or**
- 3) Call on another board member **or**
- 4) Remind members of agreements **or**
- 5) Remind members of agenda item under discussion **or**
- 6) Entertain motion to postpone item until a "given" time
- 7) Stay observant for possible escalation.

### C) Confront

- 1) Stop the discussion; address the behavior with the disruptive person(s)
- 2) Stop the discussion; address the disruptive behavior; entertain motion to postpone item to a given time.
- 3) Stop the discussion; call for a break; address the disruptive behavior with the conflicting parties at the break.
- 4) Stop the discussion; entertain a motion to postpone item to a given time; address the disruptive behavior after the meeting.
- 5) If conflict is not resolved, you may want to suggest mediation from an outside provider.

## A-E-I-O-U: A Guide for Giving Feedback

### A—Acknowledge

Acknowledge the other person's positive intention; identify the behavior upon which you want to focus your feedback.

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*Example: "I can see that you are concerned about our students' reading achievements."*

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### E—Express

Express your feelings about the behaviors you have observed; state the specific behaviors that are of concern.

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*Example: "I felt frustrated when you interrupted my comments."*

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Pause for the person's response about his or her behavior. Support the receiver in keeping the discussion focused on the identified behavior and the specific incident(s).

### I—Identify

Identify what you want.

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*Example: "I want to have the opportunity to express myself without being interrupted."*

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### O—Outline

Outline the specific behaviors you would like to see in the future.

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*Example: "I would like you to wait until I have finished before you comment."*

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### U—Understanding, Agreement, Compromise

Ask for specific reactions to your suggestion. Listen for understanding. Acknowledge and respond to objections retaining the focus on the issue or the behavior. Develop alternatives, if necessary. Give up the need to be the *winner*. Get agreement for specific new behaviors.

## Guidelines for Giving Feedback

**Feedback is *most effective* when the person giving the feedback does this:**

- Addresses the specific behaviors, not personality traits
- Gives feedback immediately or soon after the behavior has been exhibited
- Expresses his or her reaction to the behavior, not judgment
- Gives the receiver enough time to allow for correction
- Provides the feedback in private, if possible
- Is supportive of improvement
- Matches the time available for the feedback with the size of the concern

**Feedback is *least effective* when the person giving the feedback does this:**

- Uses labels, rather than specific descriptions of behavior
- Exaggerates
- Is judgmental and blaming
- Speaks of others' reactions and not his or her own
- Does not restrict the feedback to information he or she knows for certain

## Guidelines for Receiving Feedback

- Notice any defensiveness within yourself. Let it go.
- Breathe slowly and deeply. This helps you to relax.
- Listen carefully.
- Ask questions to clarify the specific behavior the person wants to address.
- Acknowledge the feedback (for example, "Thank you for telling me.")
- Acknowledge the valid points. Correct any misinformation without justifying your behavior or blaming another person.
- Take time to sort out what you heard.
- Discuss alternatives that would be acceptable to both you and the person giving you feedback.
- Come to a positive closure.
- Let go of self-blame. Consider that the information provided was feedback only and not an indication of failure.

## Communicating Team Operating Procedures

### Definition

- An operating procedure is a set of steps used to accomplish a goal or task.
- Team operating procedures are agreed-upon procedures, written by the team for the team, specifically outlining how the team will implement certain responsibilities.

### Benefits of having written team procedures

- Written procedures reduce confusion, misunderstanding, and erroneous expectations.
- Written procedures clarify who, what, and when.
- Written procedures improve the team's working relationship by clarifying responsibilities.
- Written procedures sustain effective practice without "reinventing the wheel".
- Written procedures ease the transition of new team members by clarifying expectations and established practice.

### Critical considerations when developing written procedures

- Team members should agree on how many, and which, of the team's responsibilities they wish to outline in written procedures.
- All team members (including the superintendent) should participate in development and agree on the procedures.
- Procedures should be reviewed annually.

## Identifying Areas for Team Operating Procedures

### Examples of activities for team procedures

- Board meeting preparation
- District planning and evaluation
- Developing, adopting, and reviewing policy
- Hiring and evaluating the superintendent
- Adopting and reviewing the budget
- Communicating with the community and staff
- Standards of ethical behavior

### Assessing the need for written team procedures

The following questions may be used as criteria to determine priority procedures to discuss, add, delete, change, or write down.

- Do any board-superintendent team activities exist for which any member does not know the accepted or appropriate practice?
- Do any board-superintendent team activities exist about which there is confusion or disagreement as to the accepted or appropriate process to follow?
- Are there team tasks that would be carried out more consistently, efficiently, or effectively, if team procedures defined them more explicitly?