

How to Facilitate a Meeting Successfully

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From Planner's Web

Facilitating meetings successfully takes skills and techniques that are rarely taught in planning school. Planners often are expected to bring people together in public settings, usually to discuss policies or programs people want to know more about or are asked to support. Facilitating such meetings successfully, whether with 10 or 100, takes skills and techniques that are rarely taught in planning school. Most of us probably can think of one or more examples where matters went horribly wrong. Hopefully, we can recall others where the results were satisfactory for all. Not every planner can be an outstanding facilitator, but most can be at least adequate for the job. One can learn by doing, and while experience can be a good teacher, there are many tools that may be valuable. These tips may help.

1. Do not attempt to be the know-it-all. The most effective facilitators are familiar enough with the subject to keep the meeting on track but not too much versed that they become the expert. The best role to play is as the neutral convener who gains the respect of all parties.

Attendees should not be led to believe they will have a chance for a dialogue or discussion and then find that it is a "show and tell" meeting where they are expected just to listen.

2. Agree on the purpose or goals of each meeting and design the announcement, publicity, and format accordingly. Is the primary purpose to inform the public about a specific project or decision or engage people in helping solve an issue?

Hand out an agenda with the expectations clearly stated. Attendees should not be led to believe they will have a chance for a dialogue or discussion and then, when they get there, find that it is a "show and tell" meeting where they are expected just to listen.

The facilitator's job is make everyone comfortable in whatever the setting, but it is more difficult or impossible if people believe they were deceived about the purpose of the meeting.

3. Choose the most appropriate environment or venue. Each community has one or more meeting places where people feel the most comfortable. Schools, libraries, community centers, and some churches often are the most welcoming environments while City Halls or County Courthouses can be the least. Having to go "downtown" can be intimidating to just the audience you want to reach, especially if you are dealing with people whose first language is not English. Find out where your target audience is accustomed to gather and set up your meeting there.

4. Start and end on time and stick to the schedule. Choose the time most convenient to your attendees, not yourself. Here again the agenda can help. Indicating the timing for each item helps people keep track and is an invaluable aid to the facilitator who can politely, but firmly, keep the meeting moving by reminding people the clock is ticking.

Design each meeting to meet the needs of the specific subject, the participants, and of course, your goals and objectives.

5. Do not expect one format to fit all circumstances. Just because you have had success with a workshop-type meeting last month does not mean it is best this time. Design each meeting to meet the needs of the specific subject, the participants, and of course, your goals and objectives.

6. If this is a discussion type meeting, give everyone an opportunity to participate but allow no one to dominate. Accordingly, give credence to differences of opinion, but do not dwell on them. Limit individual remarks or testimony to a reasonable time and enforce it politely but firmly.

7. Use a microphone if there is any chance people in the back of the room will not be able to hear you. Facilitators lose their audience at the outset if they eschew the mike when it is needed. Facilitating a meeting well includes holding the microphone when you let those in the audience speak. Saying somewhat coyly, "I'm sure my voice is loud enough" or asking people if they can hear you and doing nothing about it when they say "No" can create a restless and angry audience.

Moreover, in tense situations, the microphone can be your ally. Always show you are in charge by not handing it over to those in the audience. Instead, hold it for them when they speak. Politely but firmly cut people off if someone is speaking too long or off the subject.

8. Review the visuals of your speakers or presenters before the meeting to make sure they advance not obfuscate their messages by being too long, too wordy, laden with planning jargon and generally difficult for laypeople to understand.

9. Respect each questioner or testifier even though you personally disagree. Show by your body language that you are listening carefully ... keep your hands off your hips or behind your back, and do not roll your eyes or otherwise indicate disapproval or disinterest.

10. Avoid jargon. Use language laypeople can understand or explain acronyms or terms people may not understand.

11. Give each speaker or presenter a time limit and enforce it by interrupting if you have to. "I am so sorry, Joe, but your time is nearly up. Please summarize your remarks in another minute."

12. Do not allow people to clap, shout or otherwise show their feelings in ways that disrupt the meeting. Give them ample opportunities to write down their comments or suggestions and paraphrase them if you have a question and answer session.

13. Promise only what you can deliver. If you say you will get back to the person in a day or a week, make sure you have the name and contact information and do what you say you would.

It may not be easy for professionals to admit, but in the long run, people are convinced by people, not by information. If the public respects and feels comfortable with the facilitator, they will respect how he or she conducts the meeting.

We have focused in this article on facilitation, as that is the role most planners play in public situations. At times, where there are entrenched positions and vital public issues to resolve, mediation or even arbitration may be needed. These require some of the same skills as a facilitator, but in a more structured setting best left to others more professionally trained for those roles.