

How to Work with Meeting Facilitators :

Oct 1, 2005 12:00 PM, By Aaron Dalton

The good news: Meeting planners and facilitators both want the same thing: the success of a client's meeting. The not-so-good news: Most planners don't know how to work with facilitators or truly understand how they can help them to do their jobs better.

It's hard for some planners to see how these virtual outsiders can become so intimately involved with their meeting's process and purpose. But that's exactly what makes facilitators so valuable: They are independent and impartial, unlike anyone else in the room.



"Facilitators are able to rise above any office politics or factionalism that may exist within the parties at a meeting and help all participants move toward the meeting's declared goal," says Betty Kjellberg, CAE, executive director of the more than 1,300-member International Association of Facilitators, Scottsdale, Ariz. While planners need to focus on keeping a meeting running smoothly, facilitators deal with the relationships and interpersonal interactions of the attendees. It's that neutral, external perspective that a facilitator brings to the table that is most helpful in getting a

group to reach its goals.

When the corporate leadership team at Riverton, a Cambridge, Mass. — based information technology consulting firm, prepared to conduct a recent annual corporate planning session, the company decided to use a facilitator. "In my experience, if you don't engage a facilitator for a session like this, it's usually the CEO (me) who runs the session," says CEO David Gleason. "It's all too easy for me to overweight my ideas and block free-flowing input from other members of the team.

"By using an independent facilitator, everyone feels more equal, and active participation by everyone is more certain," he adds. "It also frees me up to listen more attentively to the ideas of other members of the team."

"It's always so rewarding for me to see the enthusiasm in the group by the time we get to the end of the meeting," says Kjellberg, who has been facilitating meetings for seven years. "People will say, 'We have been meeting forever, but never made this much progress before. Now we have a much clearer view of where we are going.'"

How It Works

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The first step for most facilitators is to interview their clients to get a handle on the desired meeting outcome. "Facilitators add most of their value in the planning stages with the three P's: Purpose, People, and Product," says Sandor Schuman, PhD, research associate at the Center for Policy Research at the University of Albany, New York.

Schuman has been facilitating meetings for more than 30 years and is editor of the IAF *Handbook of Group Facilitation*. "They always work with clients ahead of time to elucidate the goals of a meeting, determine what final physical product the client wants the meeting to produce (a list of ideas, a resource allocation plan, a policy statement, etc.), and what people need to attend or participate in the meeting to achieve both purpose and product."

Of course, their other function is to keep the meeting on track. "You have to be able to listen and then ask questions that help them [participants] articulate better and think more deeply about what they have been saying," says Kjellberg. "You are constantly not only listening to the content, but also thinking about the process and trying to determine if the meeting is working and going where it needs to go."

During the meeting, facilitators use a variety of tools and techniques to draw out and channel the knowledge and skills present among the meeting participants. For example, they establish ground rules to keep the meeting on track. Some use specific processes to spark brainstorming. Others use games to help accomplish their goals, such as a visioning exercise to inspire the group to think outside the box, or activities to get the creative juices flowing in a product development session. The facilitator (or an assistant) will often record and arrange ideas on white boards or foam core and post them on walls.

Facilitators need flexibility to do their work. They want to be able to rearrange the chairs, set up flip charts on tripods, and tape things to the walls. This is where the planner and facilitator need to coordinate their efforts: If a room is a beautiful space, but the walls are covered with paintings, or the chairs are bolted down in an amphitheater arrangement, or the floor is sloped (thus throwing the tripod off balance), the facilitator will be unable to properly do his or her job. Yet both Kjellberg and Schuman lament the fact that meeting planners and facilitators rarely collaborate on meeting space decisions. Usually, the first time they actually meet is minutes before the meeting starts.

Such coordination may be developing, says Joan Eisenstodt, chief strategist for Eisenstodt Associates, LLC, Conference Consulting, Facilitation & Training, Washington, D.C. After working with a "superb" facilitator on one of her programs, Eisenstodt was inspired to broaden her own skills and become a facilitator for her own meetings.

Why isn't there more understanding of facilitation in the meeting industry? According to Eisenstodt, it is starting to happen. "I think our industry is working hard to get planners to be more strategic in their thinking and to help their organizations become more strategic about meetings. Facilitation is the next logical step to getting there."

Finding a Facilitator

Where's the best place for meeting planners to find a facilitator? Many facilitators report getting the bulk of their business through word of mouth, so the safest course is asking peers if they have ever worked with a facilitator whose techniques or results they admire.

There is no source for group facilitation rates, but the going rate seems to be at least \$1,000 or more per day, plus expenses. Some companies, such as Meeting Facilitators International, Toronto, Canada, have a money-back guarantee; if you're not satisfied with the results, you don't pay.

If you can't get a personal introduction to a facilitator, several electronic resources can help you to track one down. The IAF (www.iaf-world.org) has a "Find a Facilitator" link on its homepage that allows visitors to either search the entire IAF membership directory or a subset of certified members sorted by geographic location. An alternate facilitator directory called the National Facilitator Database (www.nfdb.com) provides additional details, including sample clients, billing rates, certification, and areas of expertise for the facilitators in its database. Another option is for planners to post project information to an 800-plus member facilitator discussion group by e-mailing grp-fac@listserv.albany.edu.

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In the future, the IAF plans to introduce a bulletin board service where planners who are in search of facilitators could post descriptions of their projects for a wide audience of facilitators to view. Until the service goes live, Kjellberg personally fields all requests that come into her office. Contact her at Execdir@iaf-world.org.

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Want to Be a Facilitator?

What kind of background and education does a meeting planner need to become a facilitator?

"There are numerous ways people end up in this role," says Tammy Adams, managing partner of Chaosity, a company based in Tempe, Ariz., that offers facilitation and project management services. "Some people naturally have a facilitation skill-set, just like others have a natural inclination to become negotiators and mediators. It's easy for them to do."

For those not born under a facilitation star, training programs pick up where nature leaves off. Adams runs a training class in her facilitation niche: helping companies with technology requirements and business-process analysis. Other educators teach "Facilitation 101," which covers the basics of managing group dynamics. Facilitators who master the core competencies of their profession can earn certification from the International Association of Facilitators, Scottsdale, Ariz. For information, visit www.iaf-world.org.

Learn More

All of the following books are available at www.amazon.com:

- *The Skilled Facilitator* by Roger Schwarz (1994, Jossey-Bass).
- *Facilitating with Ease!* by Ingrid Bens (2001, Jossey-Bass)
- *Facilitator's Guide to Participatory Decision-Making* by Sam Kaner (1996, New Society Publishers)
- *IAF Handbook of Group Facilitation*, edited by Sandor Schuman (www.iaf-world.org)

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