

## **Navigating Change: Facilitating Effective Meetings Q & A with Odin Zackman, DIG IN**

---

*The following questions were posed during a webinar hosted by Smart Growth America for the Sustainable Communities Network on November 22, 2011. It featured Odin Zackman of DIG IN discussing effective engagement, facilitation and follow-up for community and coalition meetings. Odin's additional responses to questions unanswered during the webinar are shared here:*

### **What if you aren't a facilitator and a meeting is way off task or off topic. Any ideas?**

I am usually facilitating the meetings I'm in, but I've been in plenty of situations where I'm in a meeting or others are in a meeting that I'm facilitating and it's OK to speak up and ask: "Are we really talking about what we need to focus on here?" If you do this in a diplomatic, but firm way, it's a great 'creative disruption' that can get the facilitator—and the group—back on track. If this keeps happening, it might be good to say something to the facilitator, or to volunteer to facilitate a meeting yourself. Slight deviations from the agenda are OK every now and then, but if this keeps happening, you probably have a facilitator who isn't walking the line of allowing open conversation and keeping the meeting on track and a graceful intervention during the meeting or between meetings will be helpful—for you and all of the participants.

### **When's the best time to send in the meeting notice and agenda? 1 week prior or 2 weeks?**

I like to give people a week to sit with an agenda before a meeting. Much more than that and it's like a party invitation sent too early. People forget about it and it needs to be sent again. One exception to this is an agenda where you'd like feedback (something I often do) and then you should send it out 2-3 weeks beforehand, giving yourself to incorporate feedback appropriately and get it back to folks a week to 10 days before the meeting.

### **What's the maximum time you should allot for an outside speaker for meetings?**

This depends, but I like my meetings to be fairly interactive and rely on the wisdom and experience of the folks in the room—community members affected by decisions, coalition members participating in framing next steps. If you have a one or two-hour meeting, I would limit an outside speaker or panel to about 10% of your time so you can focus on the issues that this outside speaker frames. If it's someone who can give you a real "lay of the land" and then engage with participants in an interactive discussion (not just a Q & A) and this will be helpful to the decision you are trying to make, you can always allow for more time.

### **We no longer have a budget for food--how do we fill that void??**

I think I mentioned this briefly during the webinar, but I regularly hold meetings that are potlucks—rather than having food provided. There are several advantages here (besides saving money): people are sharing food, along with something personally or culturally important, both of which help build relationships; often, people bring dishes from home (and you can have them

bring their own plates, cups and utensils), cutting down on waste; and, people feel engaged in the meeting and your purpose even before you start as you are asking for their help in supporting the community overall.

Sometimes, I have people rotate this responsibility, with people signing up to bring food for a particular meeting in small groups, or you can just have everyone bring a dish each time.

You might also find that local restaurants or cafes are willing to donate food as an advertisement and as part of their community service commitment. I've gotten lots of free coffee, pastries, sandwiches and pizza, by canvassing local (or even chain) businesses and asking for their support.

**What do you think of the "magic wall" that is a sticky cloth that people can stick on their responses they wrote on 5x8 sheets of paper, etc.**

I like it and it works well, but I often use Post-It notes (get the extra-sticky kind) of different sizes to get the same effect. The magic wall is not magic—it actually requires repeated applications of an adhesive that gets paper to stick to it. If you're going to use it, it's a great tool, but I'd advise that you apply the adhesive without a lot of other folks in the room—or even do this outside before the meeting.

**I'm one of those people who doesn't talk much in general, so facilitating group discussion is scary. Any suggestions for how to make it easier/more comfortable for ME? :)**

**What is your view on the effectiveness of a facilitator who doesn't have "thick skin," or who wears their heart on their sleeve? If a facilitator has that personality, how can those traits be used for positive outcomes?**

Well, good for you for even being interested in stepping into this role! I think anyone can be a facilitator, and many of us know that public speaking is one of the greatest fears that people in this country express on a regular basis. It's not an easy role, but anyone can do it—if you are less comfortable or less experienced, I'd recommend working with others who can support you in this (either in the group or as a co-facilitator) who understand that you are not entirely comfortable but want to be supported in this role. I also think it's a good idea to plan out your agenda well and even have a few tricks up your sleeve for what you might do if things go off track or someone challenges you or another member of the group. Being prepared is the best way of navigating any meeting, no matter what your experience level.

And finally—and perhaps most importantly—facilitating shouldn't be about *having* to talk a lot. Ideally, you are encouraging everyone in the group to talk. It's not about running things or making a speech, but about coming up with questions and activities that get people to share their ideas to build healthier communities.

**What if you do have a specific agenda in convening the group...to strategize the best approach for policy and regulatory changes to encourage a built environment that supports active living?**

It is *absolutely fine* to have a specific agenda in convening a group—in fact, you should have this—but being clear about this up front and the way in which you communicate about it is important. I wouldn't invite people to a meeting using the language in this question, for instance. Something like “What do we need to do to keep our community healthy?” might be a better way of titling this and engaging folks, with a by-line of “Come learn about and discuss tools we can use to build healthier neighborhoods”.

Every meeting should have a purpose—otherwise, why meet? Where folks get into tricky territory is by either (A) not being clear about the purpose of the meeting and planning and soliciting the appropriate input beforehand or (B) having their own agenda and trying to control the meeting outcomes, using a meeting as cover for true public input.

Clarifying the purpose of the meeting and how specific the agenda is needs to happen well before you are in a room with 20—or 200—people, wondering about why they took a weekday evening or weekend afternoon away from home and other activities to be there. The meeting can be very specific (as in the above question) or it can be a more general public input meeting (but to what end?). Having a sense of what's important to people and what issues they respond to before the meeting takes place—through surveys/polls, individual interviews, or community focus groups—is a great first step.

**What if I'm being asked to facilitate a discussion on an issue that affects me directly (ie. about changes that affects my own neighborhood). How to not be biased by that?**

This is directly related to the previous question, and while you can do this successfully, it takes some practice. Like any place where there might be a conflict of interest, facilitators should think about what their role is and how neutral they can be in a situation where there is an issue that directly affects you. For broader community or city-wide issues, it can be challenging to find someone (who isn't a professional facilitator) to help run a meeting.

For neighborhood issues, you could ask for a co-facilitator (or entirely different facilitator) from another neighborhood, or you can be completely transparent from the start (always a good idea) and talk about the fact that this issue concerns you, that you will be doing your best not to express your opinion as a facilitator (but to listen to the concerns and ideas of the group) and if there is a time when you would like to express your opinion, that you are very clear in doing so (I often stand in a different part of the room, change my sit or—and I know this is silly but it works—mime and talk about “taking off my facilitator's hat and putting on my community resident hat”).

**What do you think is the most effective way in reporting back to a group? Should there be follow up meetings scheduled?**

I'm a huge proponent of skillful follow-up and follow-through. At the end of each meeting, there should be clarity around roles and responsibilities (who's doing what) and a timeline (by when). It's also nice to let people know HOW you will communicate this—a date when you'll report back and in what kind of venue.

If folks are on an e-mail list or phone tree, your report back and follow-up can be via e-mail or phone. Often, it's a common practice to have another meeting to let people know what's happened and this has the added benefit of keeping people engaged. You don't have to know when all of your meetings will be scheduled (although sometimes having a regular time is helpful—e.g. we meet on the third Thursday of each month from 6-9PM in the community room at the local church), but you should let people know 2-3 weeks in advance and remind them each week and then a couple of days beforehand via e-mail, phone, flyers, or other outreach.

At the meeting, I like encouraging those responsible for the follow-up to share updates (rather than the facilitator or a single person just reading a list of updates). Just be sure that people reporting back know what you want from them and how long they have (we'd like a two-minute report-back sharing what happened, what you learned and what your proposed next steps are).

You should leave the appropriate time for this (and any discussion of next steps) when you plan your agenda.

**How do the rules of engagement change with a long-standing board rather than an open meeting?**

Both long-standing and open meetings require agreements and guidelines to be successful, but with a long-standing meeting you have the advantage of having built relationships and understanding people's perspectives and personalities much more. You still might have challenging folks to manage in any setting, but in a long-standing meeting it is often more predictable and therefore manageable (by talking to people beforehand, meeting individually between meetings as necessary, encouraging others in the long-term group to serve as allies or bridge-builders). However, it's also easy for a long-standing group to become complacent or fall into patterns that aren't helpful. It's useful to have regular check-ins (at an open meeting and in a long-standing group) evaluating how meetings are running, if people feel that you are accomplishing objectives, and providing an opportunity to change direction if necessary.

**Please discuss differences between facilitating larger and smaller groups, as well as longer-term (multi-year) and shorter term efforts.**

Great question, and it would be easy to fill pages on the differences (and similarities!) mentioned here.

Large or small, a group needs an opportunity to be clear about its goals and engage in dialogue about those issues that are important. The ways in which you do this for a large group are a bit

different than for a small one (you can't necessarily go around and have everyone introduce themselves and share their expectations in a group of 200, or that's your whole meeting). Breaking people into smaller groups—for both large and small meetings—is very important, as there are some folks who don't like to talk, even in a group of 6 or 8. And I regularly find that people don't do a great job at estimating the kind of space needed for different sizes of groups (I'm in many rooms that are too small for a group of 30-40, or too big for a group of 10), so be sure to have a good sense of what you need to comfortably accommodate your meeting size.

Here's a quick table with a few others suggestions about some facilitation differences and techniques for small and large groups.

<b>In small groups:</b>	<b>In large groups:</b>
Have each person share an expectation or vision as part of introductions	Have smaller groups work together to frame expectations and outcomes
Break people into pairs to reflect and brainstorm	Get people into smaller groups to brainstorm and report back
Encourage smaller group work, even if people say "But we're already a small group"	Seed personal connection by having people share their stories or reflections with the whole group
Have a team to help with notes and timekeeping	Have this same team, and potentially some additional facilitators to help with breakouts
Create connection by making eye contact and using people's names	Create connection by moving toward people when they are talking, making sure you are taking comments from all parts of the room, and using names when possible.
Deal with difficult people by legitimizing their concern and asking the group how to address this, or proposing a good time to have the conversation	Deal with difficult people by breaking into smaller groups and talking to challenging individuals separately during this time
Be sure to follow-up by assigning/providing specific tasks and next steps	Help with follow-up by asking particular individuals to "volunteer" ahead of time and get some initial people "out on the dance floor" to encourage others to step up with tasks for next meeting.

Having a bell, chime, non-shrill whistle or some other pleasant sound to get people's attention to call them back to order in a large group is something I've found quite useful.

In terms of differences between short-term and long-term efforts, both require setting expectations and agreements with the group and being clear—at the outset and at the beginning of each meeting—what the purpose and duration is for the meetings you are having. Timelines (set with meeting participants) are very helpful to both structure expectations and provide for evaluation of progress.

While rotating leadership can work in both instances, it is critical in a longer-term or multi-year effort as you will naturally experience some attrition and you want to focus on cultivating ongoing engagement and having multiple leads so that one person doesn't burn out (and the group doesn't burn out on that person!).

Another difference I've seen is being sure to scale what's accomplishable to the time you have laid out. Shorter-term efforts should focus on specific projects, while longer-term efforts often focus on multiple projects couched in a broader systems change approach. Having a structure and partners who have the capacity to help with managing a longer-term effort is critical. Often, having a "backbone organization" is essential for multi-year efforts, where shorter-term work—while no less important—can be more ad hoc.

**I am a city planner. I attend countless public meetings. There is a trend arising in which activists sabotage or hi-jack meetings in order to prevent things from happening that they do not want. Some of these activists are highly organized & use the delphi technique to disrupt consensus building and productive meeting progress. They purposefully use personal attacks, as well. How do you recommend dealing with these people?**

Unfortunately, the Delphi Technique works and is particularly effective in being manipulative and creating anger in groups. With any disruption, it's critical to not get swept up in the emotion or disruption itself (which is exactly what those organizing in this way are hoping for)—as difficult as it can be, to keep smiling and talking in a normal, calm tone of voice, and staying focused on what you are trying to do in the group is often the best way to respond and robs folks trying to disrupt the meeting of their power in doing so. The personal attacks are meant to throw people off balance, and so working with folks around how to not get flustered or angry when this happens is critical.

I also like to break people into pairs or small groups, and occasionally have invited those trying to disrupt a meeting to talk about what it is that they want. If they are invited to do so in a calm tone of voice, it can actually be a productive part of the meeting (particularly if you respond to their anger with calm, it's very disarming).

*An absolutely critical element* in this case (and with all meetings) is to be prepared, with a clear agenda and with allies in your audience and/or a strong co-facilitator and with particular responses (again, calm) and activities (like breaking into small groups or doing individual reflection) prepared beforehand to diffuse the disruption. Meeting with a core group before any meeting is essential and gathering feedback from potential participants about what they expect is also important.

**How do you deal with people who are experts and novices at meetings? How do you keep both groups engaged?**

If you are doing your engagement right, this is something you will always deal with. A few things I have found helpful include:

- Having expert or 'veteran' meeting attendees brief newcomers and novices;
- Doing an introductory exercise where people 'self-select' based on their knowledge of your topic that day and talk in groups (as an introduction, or during the meeting) about their ideas, so that you allow people to segment based on their experience;
- Having 'experts' and 'novices' coach one another—we don't only learn when experts teach novices, but I've learned a tremendous amount from people who were novices in an

area where I felt I was an expert, and likewise have seen people who had little to no experience turn conventional knowledge and a pre-determined approach on its head; and,

- Do some role playing for a part of the meeting, where experts pretend to be novices and vice versa—another variation on the above and always interesting what comes out in terms of ideas and perspectives

Many people from the general public come to a meeting already thinking they know the facts (they don't). How do you diffuse that?

This is a nice follow-on to the previous question. I like using a couple of exercises that help everyone learn and getting on the same page, without anyone feeling like an idiot (which is a real risk when people show up thinking they know the facts—experts and novices alike!):

- Have a ‘roving conversation’ where local experts on an issue are stationed around the room to provide an overview of particular issues and participants can move from station to station—this is a nice way of sharing knowledge, correcting assumptions, AND brainstorming ideas about issues from preserving agriculture and inclusionary zoning to climate change and community design;
- Create a game show, where folks get prizes and learn about important issues
- Have participants ‘teach’ each other about the facts by providing fact sheets and doing a quick partner exercise

Of course, this is hard to do every single time, but having a ritual around sharing a new fact at each meeting can be a great engagement tool and build knowledge among participants—whether they’ve come to every meeting or this is their first time.

Often, I come up against a situation where someone wants to get into a power struggle around what the facts are or “who’s right”. This can be a major dividing line (see the next question), but I often try to move past the back-and-forth on particular factual questions and resolve these outside the meeting, rather than taking up a lot of time debating this. This can be a stall tactic that folks use, and usually people aren’t that pre-meditated, but it’s something to be aware of and not get distracted by.

Any changes or different strategies when addressing complex issues such as climate change?

Using a dialogue approach around climate change and other complex issues on this level is often better than getting caught up in the facts and who believes what. Rather than ask the question around what to do about climate change (or any other complex issue), I often like to have people set a vision around what they’d like their community to look like and what the important elements of this are, as opposed to responding specifically to an issue like climate change, which can be both amorphous and divisive.

Even if you do want to focus on this issue, or another equally complex topic, using dialogue (rather than debate) can help identify areas of common ground, even among those who might disagree. Ask everyone to share their perspective on the issue in small groups, surface the values that support their perspective, and then to work as a group on looking at what some of their

overlapping values are. Working from these values (or from a shared vision from the front-end) can help people connect with each other as people, not as opponents on either side of a debate.

**Re Smart Growth issues, there is often generational conflict between older folks who support the status quo and younger persons more supportive of change/growth. Any suggested techniques to get buy-in to notion that relative newcomers are equal stakeholders?**

**When the group states the only desire is for jobs and economic development, without the understanding of true long-term economic development is and how improving the community (through planning and even some regulatory constructs) actually does not "kill jobs" but actually improves the community?**

**How do you engage people if they are resistant to change, as in wanting to have their community stay the same, even if it is not sustainable?**

These are all variants of the same question, and in the same vein as the previous question. Getting people to talk about what they want their community to look like and what values they share is a better way of framing a shared vision than leading with an agenda of “smart growth”, “creating sustainable communities” or “addressing climate change”—these can be meaningless, threatening, or both to many participants.

I find that getting all participants to set a vision of what they’d like for their community and focusing on initial areas of overlap or agreement works best. Not everyone might want a bike lane, but most people might agree on less traffic or ease and safety in getting to work, school, or important services. Start with getting all ideas, but keep an eye out for basic human needs—people’s access to food, housing, jobs, transportation—as a good guide of where there might be some areas of commonality. And do as best as you can to stay away from jargon.

**Can you share successful event activities like specific film screenings, neighborhood/community tour to invite participation from a broad audience?**

I’ve coordinated or participated in numerous events over the years that engage people and I would say that all of your ideas are good—mini-film festivals with a particular theme are great, but I’ve also found that bringing people together with their families for movies somewhere outside on a summer evening can have a better community building effect and then be a bridge for greater participation in a meeting. Likewise, a community tour (I am particularly fond of bike tours, but they are not accessible to all) is a great idea to get people to discover (and share about!) their community. I have mostly worked on coordinating community service projects which can have elements of both of the above and more—it gets folks out in the community, often with their families, and can be about sharing a meal as well (often one of the best community building/engagement activities). A clean-up, community garden project, playground installation or re-painting at a school—which can be followed by a meal and/or brief meeting for feedback—is the best way I’ve found to engage folks in ongoing community participation.

**Any other thoughts about how to get people engaged up front so they attend the first meeting in a series of several?**

**How do you keep people engaged after the meeting?**

Building relationships through asking people what's important to them is one of the time-tested methods of getting "turn out" and maintaining engagement. If your meeting is all about creating change 'out there' or affecting policies or altering community design without regard for the individuals showing up at your meeting and their stories, then your engagement will be much less effective and sustainable.

Starting a series of meetings with a meal, a community service project or tour, even just a discussion about the community and what's important to people without actually trying to jump into decision-making about what to do are all good ideas to build relationship. Talking to people individually and asking them to complete a short survey or come together for a neighborhood or block meeting (or going to a neighborhood meeting and asking to be on the agenda) is a vital step here as well—before any meeting takes place and after meetings have started to keep people engaged.

Keeping people engaged involves ongoing relationship-building and making requests of folks for small roles they can play between meetings—making a phone call to invite a neighbor, having a responsibility to bring a snack or dish to share to the next meeting, participating in a discussion or working group on a particular issue—all help with maintaining involvement.

**Local meetings that I have attended occur regularly, and continue effectively even when all the nominal leaders or facilitators leave. How can participants be empowered, so that we are not dependent on formal facilitation?**

It's great to hear that local meetings occur regularly and continue with resident engagement and leadership. This is where I hope more community groups are heading and is the focus of much of the work I do.

When we see certain people as "leaders" or "facilitators", we give over some of our own power within the group. Often this is helpful as groups can use guidance in achieving their goals—but ultimately, being able to train groups of people to facilitate their own meetings is ideal. I am doing work of this sort around the country and there are many groups (like the Institute for Cultural Affairs, the Interaction Institute for Social Change, Community at Work, and many independent teachers and trainers) that help teach facilitation skills and build community power and self-reliance. We're not used to this approach, which is a big part of what needs to shift in our culture—so that we can encourage communities to work successfully with each other, with public agencies and with non-profit and business organizations to develop sustainable approaches to creating healthier communities.