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The Four F's of Facilitation – the Secret to Successful Meetings

by Carol A. Watson, Director of the Law Library, and Wendy E. Moore, Acquisitions Librarian, Alexander Campbell King Law Library, University of Georgia School of Law

Introduction

Do you love meetings? If you are like most people, then probably you don't. We have all attended (and perhaps even led) poor meetings. Through the *Four F's of Facilitation*, we are going to share tips for making your meetings more successful.

Facilitating is about successfully guiding a group of people through the process of acting on the tasks that need to be addressed by the group. While facilitating a meeting is easier when you are leading it, even if you are just an attendee, you can still use these secrets of facilitation to improve the meetings you attend.

Foundation

One of the most important things you can do to insure a well-facilitated meeting is to build a solid foundation by thoroughly preparing for your upcoming meeting. Three key elements for successful meetings are well-drafted agendas, mutually agreed-upon ground rules, and effective meeting spaces.

- **Agendas** – No matter how small, informal, or irregular your meetings are, you must prepare an agenda. The agenda and any supporting documentation should be shared with all group members before the meeting, allowing enough time for participants to become familiar with the issues and review the documentation. Don't forget to include the date, time, and location of your meeting. It is particularly important to note the ending time for your meeting so attendees can plan their schedules accordingly.

When drafting agenda items, use meaningful action verbs such as *resolve*, *revise*, *explain*, *evaluate*, and *confirm*. Action verbs are useful for anticipating outcomes for agenda items.

Example of a poorly written agenda item: Sohn Library Usage

Example of a well-written agenda item that anticipates an outcome: Review and approve a Sohn Library usage policy.

- **Ground Rules** – Mutually agreed-upon ground rules make facilitating a meeting much easier since everyone arrives at the meeting knowing what type of behavior is acceptable. It is a good idea to have a separate meeting focused solely on establishing ground rules for upcoming meetings. The ground rules should not be just a list of don'ts, but rather a list of agreed-upon behaviors that will encourage respect for and participation of all attendees.
- **Meeting Spaces** – How you arrange yourselves as a group can increase meeting effectiveness. Select a space that will permit participants to sit in a circular or U-shaped arrangement. Such an arrangement allows everyone to see each other and

helps minimize hierarchy. In addition, a space that offers some privacy and lack of interruptions will help participants stay focused.

Facilitation Techniques

It is finally time for your meeting. Here are some practical techniques that you can use to make your meeting a more positive experience and have outcomes that are more successful.

- **Know What Needs to Happen** – As the facilitator, you need to balance the agenda items within the time allotted for the meeting, keeping in mind the relative importance and timeliness of each item. A good facilitator follows the agenda, but remains flexible. If one agenda item runs long, but it is important and resolution is near, then it is better to continue with that item and postpone a less important/timely agenda item until the next meeting. Here are two examples of how to phrase this facilitation technique:
“It sounds like maybe we need more time to think about how to address this issue. Let’s place this item on the agenda for our next meeting and continue with the rest of today’s agenda.”
“This has been a good conversation and many important considerations have been brought up. I think we can feel good about the progress made on this item. Since our discussion was longer than planned, if everyone agrees, let’s hold agenda item number 6 until the next meeting, since it is not so timely.”
- **Keep the Discussion Focused** – Often during meetings discussion can get sidetracked onto different topics. A facilitation technique you can use is to place these off-topic items in a “parking lot,” such as adding them to a future agenda item list or referring them to another group or department. That way you do not ignore the good idea or the uncovered problem, but you still maintain your focus on the current agenda item. As facilitator you might say:
“Obviously we have a lot of interest in and need to talk more about X. Let’s put that down as a future agenda item, and go back to the agenda item we are covering now (repeat the agenda item), so we can make progress on it.”
- **Summarize and Bridge the Conversation** – As facilitator you have to insure that the discussion maintains its form and direction. Periodically during a discussion you should summarize what has been discussed to that point and then use that summary to bridge toward an action plan or a decision. Here is an example of how to phrase summarizing and bridging:
“So, we have agreed that we do not want to do X, and we have heard the Y approach and the Z approach as options. Do we want to choose approach Y or Z, or do we want to continue to think about it and place finalizing the approach decision on our agenda for the next meeting?”
- **Mirror Statements to Help Clarify** – Sometimes people have a hard time expressing themselves or others in the group have a hard time understanding a point. Using mirroring can help bring clarity to a discussion. You could say, *“This is what I’m hearing you say, that X is unable to do Y. Is that what you are saying?”* That then

gives the speaker a chance to agree or to clarify further what she is trying to say. Remember, you are *mirroring*, which means you are repeating in a reworded way, not offering your own commentary or attitude!

- **Engage Attendees** – Successful meetings have a high level of engagement from attendees. There are ways to help insure that members of the group are actively participating in the discussion. You may want to utilize a round-robin technique in order to hear from everyone. Or you could directly ask individual members of the group for input during the discussion of agenda items. If you are hearing only one type of feedback from a few people on an item, ask to hear feedback from another point of view. You can engage attendees in the discussion using phrases like:
“We have all had a chance to look over the proposal before the meeting. Let’s go around the circle and each share what we saw as its strengths and its areas for concern.”
“Sarah, you haven’t weighed in on this; what do you think is the best approach?”
“We have heard from some of you about the negatives of this proposal; what are some of the positive benefits?”
- **Agree and Assign** – The facilitator needs to determine if consensus or resolution of an agenda item is being reached. Using the summarizing and bridging technique can help you figure out if you are ready for an action plan or have reached consensus. Keep in mind that not every agenda item resolves itself in one meeting, but at the very least you can try to move the agenda item forward by refining its focus. You also need to insure that action items/tasks that come out of an agenda item are agreed upon and responsibilities for them are assigned to individuals, departments, or committees. Here is one example of how to bring closure to an agenda item:
“To summarize, we have decided that we need more information on X and that John and Sarah will investigate X and will send their info to the group in advance of our next meeting.”

Fly in the Ointment

Trust us, our library can be just as dysfunctional as yours might be on any given day. Yet we have successful meetings with very little behavior issues due to our commitment to the facilitation process and to our ground rules. So what can you do when problems crop up?

- **Off-topic Discussions** – It is the responsibility of the facilitator to redirect or cut off discussion when it goes off topic. It is not uncommon for the facilitator in our meetings to remind us that we must focus on the agenda item rather than go off on a tangent.
- **Too Much Discussion** – When a discussion becomes repetitive and nothing new is being added, the facilitator must end the discussion and remind the group it is time to focus on creating an action plan.
- **Rehashing Old Topics** – Written minutes from each meeting help participants remember past decisions. The facilitator must stay alert to topics that keep coming back. Recurring topics could be a sign that those topics are not fully resolved and may need to go to the list of future agenda items to be reexamined.

- **Spinning Your Wheels on a Topic** – Sometimes decisions can't be reached and there can be good reasons for that, such as philosophical differences or a poorly defined agenda topic. Unless the matter is urgent, it is OK to table an agenda item to give everyone a chance to mull it over and revisit it fresh at the next meeting. You will be surprised how much perspectives might change when a bit of time has passed.

Finishing Touches

Successful meetings are not over when the last agenda item is finished. A well-facilitated meeting includes follow-up after the meeting.

- **Draft Agenda Items for the Next Meeting** – Make note of any agenda items for the next meeting that came up during the meeting, such as action items that need to be followed up on or new ideas you placed in the “parking lot” or a future agenda items list.
- **Schedule Future Meetings** – Establish a schedule for future meetings. In order to limit conflicts and insure that all members of a group are present for the meeting, you need to have meetings scheduled on calendars well in advance.
- **Distribute and Archive Minutes** – People often find meetings to be a waste of time because they make decisions or plans at meetings that never get enacted or they keep having to discuss the same agenda items over and over. Written minutes that are available in a shared location help document decisions and keep the work of a group moving forward. Minutes clarify what was decided at a meeting and serve as the official version of what happened. Written minutes also can help motivate individuals to get their assigned work done due to the greater accountability. Depending on the complexity of the meeting, you may want to designate another person to take minutes while you concentrate on facilitation.
- **Get Feedback** – Solicit feedback from attendees about what they thought was good about the meeting and what could be improved. Challenge them to think of things they could do to assist in achieving those improvements.

Conclusion

Facilitation creates a solid framework in which successful meetings can occur. Once group members start experiencing the benefits that facilitation techniques can have on meetings, the participation level and commitment to these techniques will rise. There will also be a decrease in negative behaviors as group members align their behavior with the agreed-upon ground rules. Stick to the *Four F's of Facilitation* and you will find your meetings will become more productive and satisfying. Now you know the secret to successful meetings!

[This article is based on the authors' AALL 2010 session, “**K4 - Facilitation: the Secret to Successful Meetings**,” the handout for which can be downloaded from the AALL2go website under the “Library Management” subheading of the Denver conference.]