Productive Communication Skills

Instructions:
Distribute this list of productive communication skills to team members. Have them review it and use it as a basis for a facilitated discussion. After the discussion, the team may choose to adapt this and add additional guidelines. After adapting these skills there should be consensus agreement that the team should use these guidelines for communication during the entire project. You might want to put the agreed upon list on a flip chart or poster and have it visible at every meeting.

- Do not bring bias or hidden agendas to the table.
- Allow others an opportunity to be heard.
- Be honest.
- Build mutual trust and respect.
- Use effective listening skills.
- Be consistent and clear when sharing information.
- Be non-judgmental.
- Be receptive and open to communication.
- Recognize barriers to communication.
- Ask questions.
- Use specific words and phrases.
- Communicate constructive ideas/comments.
- What is said during a meeting stays in confidence.
- Aim for simplicity.
- Use effective business writing.
- Seek clarification.
- Recognize different persons/groups have different frames of reference.
- Recognize the power structure/nature of the coalition.
- Utilize top-down, bottom-up and side-to-side communication.
- Follow-up, meet deadlines and commitments.
- Seek, enable and utilize feedback.

Sample Media Advisory

Instructions:
This is a sample media advisory. The media advisory is your story "pitch" on one page. Imagine a harried assignment editor who will spend about ten seconds, or less, deciding whether to cover your event. You need to set the stage for the editor, and underscore how easy it will be to get the story. Media advisories are sent one week before the event. A reminder advisory is resent two days before the event.

Use Hometown Health **Improvement Stationery.**

Arkansas Hometown Health Improvement Project

Target your audience.

Attention: Assignment Editors,
Health Care Reporters, Consumer Reporters …

Create a headline.

MEDIA ADVISORY

BOONE COUNTY KICKS OFF
HOMETOWN HEALTH IMPROVEMENT PROJECT

List a contact.

Contact:
Debbie Johnson: (870) 777-7777

Write a teaser.

Community health can be improved only when those living there take ownership and address their problems.

Midweek is best for press although the press also looks for "serious" news on Weekends.

Monday, September 11, at 10:00 a.m., the Boone County Health Improvement Committee will meet with Dr. Fay Boozman, director of the Arkansas Department of Health, to begin assessing and planning strategies to improve the health of the residents of Boone County.

Midmorning start time is Best for TV.

WHEN: **Monday, September 11, 10:00 a.m.**

WHERE: **Comfort Inn**

Make sure participants have Broad range of interests And be sure to invite a "real" person to speak.

WHO:
Dr. Fay Boozman
Director Arkansas Department of Health
Dr. Mike Smith
Boone County Hospital Administrator
Mayor Mark Johnson
Boone County Mayor

Sample Media Advisory

Arkansas Hometown Health Improvement Project

Attention: Assignment Editors,
KTVE

MEDIA ADVISORY

UNION COUNTY KICKS OFF
HOMETOWN HEALTH IMPROVEMENT PROJECT

Contact:
Susan Blake: (870) 863-5101

Community health can be improved only when those living there take ownership and address their problems.

Wednesday, September 8, at 12:00 p.m., the Union County Health Department and the Healthy Communities Coalition will meet with Dr. Fay Boozman, Director of the Arkansas Department of Health to begin assessing and planning strategies to improve the health of the residents of Union County.

WHEN: **Wednesday, September 8, 12:00 p.m.**

WHERE: **AHEC**

WHO: **Dr. Fay Boozman**
Director Arkansas Department of Health

Carol Cobb
Chairman Healthy Communities Coalition

Fifty and "One" Different Ways to Communicate Other Than Radio & Television

Talks for community groups
Bus shelters
Supermarket display
Grocery store advertisements
Chalk markings on the ground
Tie-in media promotion
Day Care centers
Bumper stickers
Bookmarks
Back of transit cards
Grocery store bags promotion
Telephone bill insert
Gas company bill insert
Printed napkins
The beauty shop
Medical offices
Labor unions leafleting
Electronic bulletin boards
Hospital bills
Cooperative advertising
Magnets
Premium giveaways
Public library
Church bulletins
Club newsletters
Bank calendar/promotions
Newspaper advertisements
Shoppers/free community papers
Supermarket coupons

Transit advertisement
Wall posters
Handbills
Leafleting
Newspaper inserts
Hospital emergency room
Play groups
Schools/PTA/teachers
Back of entertainment tickets
Shopping bags
Children's toy store
Electric bill insert
The circus
Cable TV bill insert
Road/bicycle races
Phone banks
Social service agencies
Computerized pay stubs
Special sporting events
Medicaid walk-in facilities
Taxis/buses
Fitness centers
Theater announcement
Sports schedules
Sports scoreboards
Department store promotions
Ice cream parlors
Cooperative giveaways

Writing a Letter to Potential Members

Instructions: Use this guide to help you draft a letter to potential team members.

Making personal contact with potential members is best when possible. The more personal the contact, the greater your chances of success. This is especially true when the potential member knows, likes, and trusts the person doing the contacting. But letters definitely have their place. There may be too many potential members to go see everyone, or you may know that certain people prefer a letter to a personal visit. A good letter can be strongly influential, often more so than a mediocre meeting. Letters can also be kept and referenced.

A letter used to recruit new members for your group or organization may vary in format from a general form letter to a more personal handwritten note. Usually it is mailed, but it can also be printed in a newsletter or local newspaper, or even sent by fax or email.

Why should you write a letter to a potential member?

Because, as with any membership contact method, your hope is:

- ✓ To recruit new members into your group or organization (the main goal)
- ✓ To raise awareness of your group and the issues that are important to it
- ✓ To give potential members a written overview of your organization that explains its purpose, highlights common interests, and suggests areas of possible involvement
- ✓ To ask for specific assistance on specific programs or projects

When should you write a letter to a potential member?

You should consider writing just about anytime you are trying to increase your membership size or your community recognition, or when you need more organizational help. But especially;

- ✓ When you do not know the potential member well enough to make a personal contact
- ✓ When it is difficult to reach the potential member on the phone
- ✓ When you want to convey some detailed information about your organization that is too lengthy or complex for a phone call or meeting (this can go in a fact sheet or brochure, which the potential member can keep on file)

A letter can also be used in connection with a personal meeting. Letters and face-to-face meetings can work together. So write a letter:

- ✓ When you want to have a personal meeting, and think that sending a letter will help you get that meeting
- ✓ When you want to follow up after a personal meeting with a thank-you; with further information; to confirm agreements made; or to reach agreements in the first place

Sample Letters to Potential Members

Dear

We need your help to improve the health and quality of life in Boone County. We are forming a group of interested community members, public and private organizations, health care providers and businesses to address the unique needs of our community.

A brochure describing the Hometown Health Improvement Project is enclosed. This is an excellent opportunity for us to pool our efforts and make significant improvements in Boone County.

This project provides us with technical assistance, expertise, and a link to resources while allowing us to maintain control. We will determine which areas of our community we think need work and how we would like to do that.

Please join us on ______, December ___, 1998 in the ________ room at the Comfort Inn to begin planning how we will proceed on this important endeavor.

Thank you for taking the time to consider the potential of this project. Working together we can make a difference in Boone County.

If you have any questions or would like to meet with me to discuss the Hometown Health Improvement Project and how it can benefit you and Boone County, please do not hesitate to contact me.

Sincerely,

Debbie Johnson

Sample Letters to Potential Members

Date

Name
Address of person sending letter to

Dear

We need your help to improve the health and quality of life in (name town or County. We are forming a group of interested community members, public and private organizations, health care providers and businesses to address the unique needs of our community.

A brochure describing the Hometown Health Improvement Project is enclosed. This is an excellent opportunity for us to pool our efforts and make significant improvement in (name town or County).

This project provides us with technical assistance, expertise, and a link to resources while allowing us to maintain control. We will determine which areas of our community we think need work and how we would like to do that.

Please join us (give date, time and place) to begin planning how we will proceed on this important endeavor.

Thank you for taking the time to consider the potential of this project. Working together we can make a difference in (Name Community).

If you have any questions or would like to meet with me to discuss the Hometown Health Improvement Project and how it can benefit you and (name County), please do not hesitate to contact me.

Sincerely,

Sample Letters to Potential Members

Date

Name
Address of person sending letter to

Dear

We need your help to improve the health and quality of life in (Name town or County). We are forming a group of interested community members, public and private organizations, health care providers and businesses to address the unique needs of our community.

A brochure describing the Hometown Health Improvement Project is enclosed. This is an excellent opportunity for us to pool our efforts and make significant improvement in the health of the citizens of (Name of town or County). Health effects everything from how well our children do in school to how productive our workforce is.

This project is unique in that it provides us with technical assistance, expertise, and a link to resources while allowing us to maintain control. We will determine the needs of our community and how we would like to address them.

Please join us on (date, time and place of meeting) to begin planning how we will proceed on this important endeavor.

Thank you for taking the time to consider the potential of this project. Working together we can make a difference in Boone County.

If you have any questions or would like to meet with me to discuss the Hometown Health Improvement Project and how it can benefit you and (County), please do not hesitate to contact me.

Sincerely,

Sample Letters to Potential Members

Date

Name
Address of person sending letter to

Dear

We are forming a group of interested community members, public and private organizations, health care providers and businesses to address the unique needs of our community. We need your insight and knowledge of the community as well as your dedication to making it a better place to live for this project to be successful.

A brochure describing the Hometown Health Improvement Project is enclosed. This is an excellent opportunity for us to pool our efforts and make significant improvement in the health of the citizens of (Name town or County). Health effects everything from how well our children do in school to how productive our workforce is.

This project is unique in that it provides us with technical assistance, expertise, and a link to resources while allowing us to maintain control. We will determine the needs of our community and how we would like to address them.

Please join us on (time, date and place of meeting) to begin planning how we will proceed on this important endeavor.

Thank you for taking the time to consider the potential of this project. Working together we can make a difference in (name town or County).

If you have any questions or would like to meet with me to discuss the Hometown Health Improvement Project and how it can benefit you and (name town or County), please do not hesitate to contact me.

Sincerely,

Follow-up Letter to Telephone Conversation With Potential Sponsor

Instructions:
Use the sample follow-up letter below as a model.

Date

Name
Job Title
Agency/Organization
Address
City, State, Zip

Dear Name:

I wanted to thank you for the opportunity to describe the Hometown Health Improvement Project developed by the Arkansas Department of Health to assist communities in addressing their unique health needs. I am enclosing a copy of a brochure describing the program for your review.

Creating a healthy community takes a commitment from those of us who live in it. We cannot address the needs of our community alone. But working together we do have the power to improve the health and quality of life in our community. This project offers an opportunity to bring together public and private organizations and businesses to identify and address issues in a collaborative manner.

There are numerous potential benefits including reduced health care cost, a reduction in the number of days missed at work and school due to illness, fewer preventable illnesses and injuries, and better and more efficient use of limited resources.

These are just a few of the benefits our community can realize when those of us concerned about the health of our community work together.

I look forward to meeting with you to discuss this further on (date). In the meantime if you have any questions or would like additional information please do not hesitate to call me.

Sincerely,

Sender's Name
Job Title

The above is a sample follow-up letter to a telephone conversation. The letter should be between one and two pages long. In addition, the initiating agency representative's letterhead should be used.

Follow-up Letter to Meeting With Sponsor

Instructions:
Use the sample follow-up letter below as a model.

Date

Name
Job Title
Agency/Organization
Address
City, State, Zip

Dear____________:

I appreciate you taking time out of your busy schedule to meet with me. Your suggestions will help as we proceed with this project.

During our meeting, you indicated that you were interested in seeing the Hometown Health Improvement Project succeed in our area. Your commitment and participation will help ensure that we are successful in improving the health and quality of life in (name community). I'd like to thank you for agreeing to be a sponsor and for committing to invest your time in such an important endeavor for our community.

(Reference whatever follow up steps you have agreed on such as beginning to contact stakeholders to join the coalition or trying to get another sponsor) If you have any questions please call me at .

Sincerely,
Sender's Name
Job Title

The previous is a sample follow-up letter to a meeting with a sponsor. The letter should be between one and two pages in length. The initiating agency's letterhead should be used.

A follow-up letter should include a thank you for their time and input and it should be sent even if they did not agree to sponsor the project. Refer to what they did agree to do such as participate in the coalition.

This can be done by reviewing the critical points and decisions made at the meeting. If sponsorship was secured, confirm it. Reference and include any materials discussed and any specific commitments agreed upon at the meeting.

Conclude the letter and inform the sponsor of the next action. Offer to answer any questions the sponsor may have and provide a telephone number.

Sample Press Release

Instructions:
Use the sample press release below to develop appropriate press releases about the project. A press release is useful to publicize the project to the community and to provide positive recognition for the stakeholder team members. You can use the Department's press release paper or Hometown Health Improvement Project stationery.

PRESS RELEASE

FOR IMMEDIATE RELEASE
Date

FOR MORE INFORMATION, CONTACT:
Name of LHU Administrator
Name of Local Health Unit
Phone Number & After hours number

Boone County Chosen for Health Department Project

Boone County has been selected to participate in the Arkansas Department of Health's Hometown Health Improvement Project. The project seeks to forge a partnership between health care providers, employers, and the community with the common goal of improving overall community health. John Smith, chief executive officer of the Boone County Hospital, stated that the hospital is a primary sponsor of this project and will be contributing meeting space, company resources, and staff time to help the project succeed.

"We are excited because this approach ensures that the initiative is locally owned and controlled and addresses our unique needs" said Debbie Johnson, administrator of the Boone County Health Unit. The Health Department will provide leadership and technical assistance to the project. They will also provide tools for collecting data as well as helping to identify potential resources to solve problems the community decides they want to address.

Some of the benefits to the community the coalition hopes to realize include: (Brochure has several listed decide which fit your community.)
Improved health and quality of life in the community;
Reduced preventable illnesses and injuries;
Better coordinated community health services.

Creating a healthy community depends on the commitment of those who live there. It requires sharing resources to support common goals. Everyone in the community has something to contribute.
For more information on the Project and how you can become involved call_____________________.

Outline for a Press Release

Instructions:

The following lists the elements of a press release. Use this and the previous sample to help draft your press releases.

Logo

Your press release should be sent on letterhead or have some logo or heading clearly identifying your organization.

Release date

The release should have "FOR IMMEDIATE RELEASE" or "FOR RELEASE AFTER" followed by the date.

Contact Person

The name of the person to contact in your organization for further information, followed with their telephone number.

Headline

The headline for the release should be succinct and informative and capture the meaning of the story.

Indent

Paragraphs should be indented five spaces

Spacing

Double space the body of the release, type on one side of the page only, use at least one inch margins

Pages

For a release running more than one page, use the word "-more-" at the bottom of each page; if it is the end of the release, use "-30-". This is standard form for news releases.

Page numbering

If your release runs more than a page, head each subsequent page with the page number and a shortened version of the headline.

Meeting Agenda			
Name of Group:			
Date:			
Time:			
Title of Meeting:			
Place:			
Agenda Item	Process	Time	Person(s) Responsible

Arkansas Hometown Health Improvement Project

Boone County
Agenda
January 12, 1999
10:30-12:00

Welcome
Debbie Johnson, Administrator Boone County Health Department

Ice Breaker
Sara Barnhart, Regional Hometown Health Coordinator

What Can a Community Health Assessment Do for You?
Marie Morgan, Extensive experience in community development in Searcy and Van Buren Counties

Define Community
Cathy Flanagin, Director Community Health Improvement, Arkansas Department of Health

What Are the Attributes of a Healthy Community?
Cathy Flanagin

Introduction of Co-Chairperson
Debbie Johnson

Develop Shared Vision
Chairmen will lead discussion to determine if the group would like to appoint a subcommittee to work on Vision to be presented at the next meeting

Discuss Next Meeting/Follow-Up
Chairperson

Arkansas Hometown Health Improvement

Southeast Pulaski County
Organizational Meeting
Agenda
May 9, 2000
5:30-7:00

Welcome	Elizabeth Delone
Introductions	Elizabeth Delone
Purpose of Meeting	Elizabeth Delone
Hometown Health Improvement	Cathy Flanagin
Our Community	Pulaski Sheriff's Office
Partnership with Baptist Health	Sandra Brown
Questions/Feedback from Group	Elizabeth Delone
Identifying Stakeholders	Elizabeth Delone
Set Next Meeting	
Adjourn	

Drew County Hometown Health Improvement
Meeting 3-Importance of Evaluating Health Dimensions
October 11, 2000
11:15-1:00

11:15-11:30 Lunch

11:30-11:45 Discussion of dimensions
"Does the presence or absence of this dimension affect your ability to reach your definition of health?"

11:45-12:15 Importance of data driven health information

12:15-12:30 Explain dimensions and have $10 vote

12:30-12:50 Committees
Select committees to work on
Meet with committee

12:50-1:00 Adjourn
Fill out evaluations
Tell next meeting date
What will be done at next meeting
Thank you for coming

Ice Breaker and Introduction Exercises

Instructions:

The following exercises can be used and adapted to get meetings started. Some are very simple and some a little more involved. Consider the time you want to spend on such an exercise when choosing. It is also a good idea to use an experienced facilitator when using exercises with a group.

Ice Breaker

Divide the larger group into small groups. Have each person write down two things that the others do not know about them and a third thing that is made up, or not true. Have each individual share their 3 items with the group and the group tries to guess which one is not true. This can be a fun way for people to get to know each other a little better and can be done fairly quickly.

Find Someone Who...

Instructions: Find someone who can honestly answer yes to one of the activities listed. Have them sign your paper next to that activity and then move on to someone else. A participant can only sign your paper once. Try to get as many activities signed as you can until time is called.

Has a weird pet	________________
Loves to cook	________________
Can tell a good joke	________________
Is dependable	________________
Can fix a car	________________
Has a positive outlook	________________
Likes to work with details	________________
Is popular with co-workers	________________
Can sing “Texas, Our Texas”	________________
Is a good listener	________________
Likes to solve problems	________________
Loves their job	________________

Ice Breaker and Introduction Exercises

Introduction/What they hope to accomplish

Have participants count off to form groups. For example if there are 40 people have them count off by fours and have four groups of ten. Ask each person to introduce themselves to their group and tell what they want to accomplish at the meeting. Then each group selects a spokesperson who summarizes what his group hopes to accomplish to the large group.

This helps people get to know each other a little, but, more importantly, gets the various needs and agendas out in the open quickly.

Ice Breaker and Introduction Exercises

Introduce Each Other to the Group

In pairs, have people turn to the person next to them and share their name, organization and three other facts about themselves that others might not know. Then, have each pair introduce each other to the group. This helps to get strangers acquainted and for people to feel safe –they already know at least one other person, and didn't have to share information directly in front of a big group at the beginning of the meeting.

Ice Breaker and Introduction Exercises

Introduction Exercise

Give a flipchart page to each participant and ask them to complete the following statement 10 times:

“I am the kind of person who………..”

This statement is difficult to answer with work-related responses and forces members to share more intimate information. Using less than 10 responses becomes too simple and does not achieve intimacy. Participants then place their page on their chest (like a sandwich board) and circulate silently, reading each others’ lists. Participants generally discover things about one another that they did not know before and have fun doing it. Pages are then posted on the wall for the duration of the session.

Survey

Give each participant a survey and have the participants interview each other to find the answers. Make the questions about skills, experience, opinions on the issue you'll be working on, their favorite vacations spot, etc. When everyone is finished, have the participants share the answers they got.

Toilet Paper Introductions

Pass a roll of toilet paper to the first person closest to you and merely say “Take as much as you think you need and pass the TP to the next person.” Don’t offer any more information. Once the TP has gone around the room, say to the group, “For every square that you tore off, tell the group something about yourself.” Then watch their faces, some will be proud they picked only one square, and others that they picked 20 squares. This works well with a variety of group sizes and is fairly fast.

Ice Breaker and Introduction Exercises

Similarities, Differences, and Expectations

The group is divided into teams of 4 or 5 and asked to prepare a flipchart that lists three things: individual differences – things that are unique to that individual, and similarities: qualities, activities, interests etc., that all team members share. Third, they are asked to list each team members expectations for the session. How this is arranged on the flipchart pages doesn't really matter. When completed each team goes to the front and one at a time members give their uniqueness, a similarity they share with others, and their own individual expectation for the session. With 40 people this could take awhile, but is a good multi-purpose icebreaker.

Ice Breaker and Introduction Exercises

The Pig Personality Profile

Give the participants the following instructions: On a blank piece of paper draw a pig. Tell them not to look at their neighbor's pig and give no further instructions other than to say the pig is of the animal variety. Do not influence how the pigs are drawn. After they have completed the assignment, give a good lead in about personality typing such as A or B, etc. and tell them this a similar test. In other words so they think it is real. Their drawing will serve to interpret their personalities.

Here are the results. (Don't shoot the messenger, I didn't draw your pig!)

If the pig is drawn toward the top of the paper you are a positive and optimistic person.
If the pig is drawn toward the bottom of the page, you are pessimistic and have a tendency to behave negatively.
If the pig is facing left, you believe in tradition, are friendly, and remember dates and birthdays.
If the pig is facing forward (towards you) you are direct, enjoy playing the devil's advocate and neither fear nor avoid discussion.
If the pig is facing right, you are innovative and active, but have neither a sense of family, nor remember dates.
If the pig is drawn with many details, you are analytical, cautious, and distrustful.
If the pig is drawn with four legs showing, you are secure, stubborn, and stick to your ideals.
If the pig is drawn with less than four legs showing, you are insecure, or are living through a period of major change.
The larger the pig's ears you have drawn, the better listener you are.
And last but not least … the longer the pig's tail you have drawn, the more satisfied you are with the quality of your sex life.

This is really more of an exercise to loosen people up than to get to know each other, though they will usually begin to talk and compare with the people near them.

Ice Breaker and Introduction Exercises

The Alphabet Game

Give each person a letter on a post-it, and ask them to place it somewhere on the front of their bodies (You might want to give more vowels, no x's, z's, q's. You can also make the vowels a different color than the consonants.)
Give them five minutes to form one word with at least 3 other letters/people (a minimum of 4 letters/people per word).
At the end of 5 minutes, take a look at all or some of the words formed, depending on the time you have.
Give each word-group a sheet of flip-chart paper and ask them to form a sentence using that word to describe their expectations of the meeting or group.

Ice Breaker and Introduction Exercises

Slogan Game

Give each person a letter. Tell them the letters go with other letters to form a word that goes with other words to create a sentence, slogan, whatever you choose. There should be enough to form it several times. Begin by relating how the sentence fits in with the meeting. This works well in a large group. “Locally designed solutions can most effectively address the health needs of our community.” “Creating a healthy community depends on the commitment of those who live there.”

Ice Breaker and Introduction Exercises

Art

Ask people to sketch a portrait of themselves and then explain it to the group. This can be interesting.

In a group, you can ask people to draw how they perceive themselves in relation to the group. This can be done at different intervals as the group develops.

Ask the group to make a collage to depict ideas or concepts. It could be to depict a healthy community or future strategies or direction, etc. The collage is then used as a discussion tool for the group.

How to Learn About Each Other

Instructions:

It is important to get to know the people in your coalition. Here are some ways other groups have done this.

Hold meetings at each other's organizations to give people a sense of the scope of the collaborative.

Plan visits of programs operated by partners. Make sure the visits are more than just quick walk-throughs. Take time to talk about what you learned; seek out differing observations and questions.

Ask partners to discuss their perceptions of each other's organizations. Then have partners describe their own. Begin to separate fact from stereotype.

Have everyone draw a simple picture of how they see their organization's position in relation to the community, families, and other partners. Discuss the variations and their implications.

Make an "alphabet soup." Have partners list acronyms and key phrases they use daily and define them.

Set a "no-numbers/no-letters" rule to encourage the use of words instead of shorthand terms that few people understand.

Arrange for day visits between organizations to create knowledge, trust, and commitment among the staff.

Use qualified trainers to run workshops on team dynamics, prejudice reduction, and conflict management.

Use social activities to promote different kinds of conversations and alliances.

Use team building or getting to know you exercises.

Overhead Transparencies

- **Bold letters**
- **Big font size**
- **Six words per sentence**
- **Six sentences per page**

Recorder Dialogue

Instructions: Use the following dialogue to introduce yourself as the recorder to the group.

“Hi, my name is __________. I have been asked to be your recorder. I am going to attempt to make a record of this meeting called group memory. It will all go on the paper taped to the wall. Obviously, I cannot write down everything, so I will try to catch key ideas, using your own words. Please let me know if I miss something that you think is important or if I start to editorialize or paraphrase. It is hard not to make my own interpretations, so keep me honest. If I get too far behind I will ask you to wait a moment until I catch up. If you cannot read my writing, please let me know.”

Guidelines for Being a Good Recorder

Your job as a recorder is to be as neutral as a tape recorder and simply capture the group's word without editing them or coloring them with your own ideas and beliefs. Here are the key behaviors for a good recorder:

Be Neutral

Record *everyone's* remarks, and don't edit. Write only key words, but use the speaker's own words. If you must condense a very long or complex idea, ask the speaker to shorten it to the essence for you. If you have ideas you want to share, write them down and give them to someone else before you start recording.

Communicate

Tell the group what your role is and ask them to help you make sure you get their ideas recorded accurately. Invite them to correct you if what you wrote isn't what they intended.
Ask for help if you need it. Ask the leader for guidance, ask a speaker to repeat something you missed, ask the group to pause and let you catch up. Ask for help writing or managing paper if you need it.
If you are unsure of what you just wrote, ask "Is this what you meant?"

Work Fast

Don't worry about spelling, grammar, or complete thoughts. Jot down key words, abbreviate, and keep up. Ask for help if you need it. Don't be a bottleneck for the group.

Accept Corrections

Accept any corrections group members ask you to make to the record…even if you wrote exactly what they said. Just make the change and say "Thank you. Is this right?" without getting defensive or wasting time explaining. It doesn't matter who was wrong or right…just make sure the record reflects what they intended to communicate.

Guidelines for Recording Words

To record for a group, you must be able to write the essence of what they are saying fast, legibly, and without slowing the group down too much. Here are some guidelines for recording well. If you're recording for a large group, don't hesitate to ask for help! Ask for volunteers from the group if you must. Then be sure to give them these guidelines.

Guidelines
Print in caps 1 ½" high
Alternate colors
Speaker's own words
Key words only
Write fast: Abbreviate
Lots of white space

Guidelines for Managing Paper
Whether you are working with large rolls of paper and big wall displays or just flipchart paper, these guidelines will help you manage the paper so it's useful for the group both during and after the session.

USE A DISPLAY WALL

Set the group up facing a large wall where you can hang lots of paper. Never record notes on a flip chart and just flip each paper over the back of the chart where no one can see it.

PRE-TEAR, PRE-TAPE

Get lots of paper set up on the display wall before the group arrives. Avoid hassling with tape and paper while you're trying to work with the group.

Have at least one hour's worth of paper posted on the wall before the meeting begins.

Post paper in layers:

-- have at least 1 “guard sheet” under the paper you’re writing on, to protect the wall from ink leaks

-- build up 2 or 3 layers of paper for recording; you finish one layer, ask volunteer to move it to a blank wall while you go on recording on the next layer

-- tape outer corners of the first layer, then move the tape in as you add layers, then you can move layers of paper without pulling off the layers taped below them

Setting Ground Rules

Instructions:
There are lots on the list of potential ground rules. Use these to help your group get started thinking about the ones they think they need to operate effectively.

This is a list of five that some groups have found useful and can work with large or small groups.

1**. One conversation at a time**
Listening skills are critical to successful group decision making. It is difficult for group members to hear a speaker if there is another conversation going on at the table at the same time, and it is impossible to listen to the speaker if you participate in that side conversation. This ground rule allows the group members to halt one of the two conversations until the other one is finished.

2. **Be brief and be clear**
This rule permits members to limit discussions or monologues after a point has been made. A time signal (hands making a "T") often is used as a signal that speakers should pause, take a moment to organize their thoughts, and then speak clearly, briefly, and to the point.

3. **The rule of thumb**
Consensus means finding a solution that everyone in the group can support, even though some members may not be in complete agreement. It is important for members to understand that in consensus decision making a person doesn't have to agree with the decision, in order to support it. A simple and quick way to cast a vote is to use the "rule of thumb."
Thumbs up = support
Thumbs sideways = uncertain; more information or clarification may be needed
Thumbs down = do not support

A “show of thumbs” about a proposal gives the group a quick means to determine whether consensus exists, might be possible, or is downright impossible.

The next step is to go to the people whose thumbs are down or sideways and honor their issues by asking them what would enable them to support the decision.

The first aim is to address the issues or concerns of the group and not to spend a lot of time on people advocating their personal views. The second aim is to create an atmosphere of inquiry. This atmosphere will help the group explore underlying interests, concerns, or assumptions in a way that leads to creating decisions that everyone can support. Setting a time limit for the group to reach a consensus, helps to focus attention on the work.

Occasionally reaching a decision that “everyone can support” is not feasible. The group can have backup decision-making rules such as: super majority (at least 70 percent of the vote is needed) or simple majority. Finding the proposal that everyone can support generally saves time in the long run. Members who dissent even in a super majority often will not “own” the decision and will raise issues at later stages in the work of the group.

4. **Peers at the table**
When group members vote to adopt as a ground rule that everyone is a peer at the table, then the issue of power and position is brought into the light. It is important that everyone accept and follow this rule.

5. **Throwing a red flag**
Any member can throw a figurative ”red flag” and stop the work of the group when the group is “off the track” (not adhering to the rules, or producing the result sought). When a red flag is thrown, the group stops to address the issue and takes action to get back on track.

During a meeting issues arise that are either beyond the scope of the agenda or are not amenable to resolution within the time frame of the meeting. These issues can be placed in the "parking lot.' That doesn't mean the members of the group step outside to hash out their differences. It means discussing the issues will be set for another time or a specific group will tackle the issue. The parking lot is a way to make sure that issues are not pushed aside or forgotten.

Many groups write down or post the ground rules. Most often, the rules are included as a part of the written materials and orientation for new members. Of course, the rules may be modified at any time to meet the group's changing needs.

Developing Ground Rules

Instructions:
This exercise can be used to help your group determine the ground rules they want to use. Having the majority of people present when setting ground rules helps to increase the ownership of the rules by all members. Using a brainstorming exercise to encourage participation helps align common themes for rules and makes the process of setting rules a little easier for everyone.

Indicate your group's ground rules for decision making below:

1. ______________________________
____

2. ______________________________
____

3. ______________________________
____

4. ______________________________
____

5. ______________________________
____

6. ______________________________
____

Next Steps:

1. How will the group communicate the rules? (Post them at meetings, insert them in an operations book, include them in orientation materials?)

2. Who is responsible for implementing the decision?

Potential Ground Rules or Guidelines

Instructions:
This is an extensive list of possible ground rules that can be used to help your group get started.

Respect each other
Attack ideas not people
Be specific
Keep discussion relevant
Comments made here stay here
One person talks at a time
Be punctual
Avoid passing judgment
Avoid killer phrases like "we already tried that" and "it will never work" and "yes, but…."
Be supportive of the other team members and their contributions
Silence and absence is consensus
Practice active listening
One conversation at a time
No backtracking for people who are late
No beepers/cell phones
5-minute rule (anyone can call the 5 min. rule—to close out a discussion
going nowhere)
Define acronyms
Everyone is equal
One person speaks at a time
Allow people to change
Balance consistency and flexibility
Check assumptions before acting
Criticize ideas, not people
Do not retaliate
Follow through
Interact
Keep an open mind

Keep communication lines open
Share responsibility
Speak for yourself
Speak up
Be open to the ideas of others
Take responsibility for your own learning
Keep things specific, real, here
You have the right to pass
Be as open as possible but honor the right of privacy
Information discussed in our group is confidential
Respect differences
Don’t discount others’ ideas
Be supportive rather than judgmental
Give feedback directly and openly
You are responsible for what you get from this team experience
Ask for what you need
Use your time wisely
Focus on our goals, avoiding sidetracking, personality conflicts and hidden agendas
Start and end meeting on time
Review and agree on agenda at start of meeting and stick to it
Publish agenda and outcomes
Everyone is expected to help facilitate the meeting
Critique/evaluate meeting
Everyone is expected to participate and to respect and support the right to be heard
100% focus and attention while meeting
Be willing to forgive
Phones and/or pagers on vibrate
Be open to new concepts and to concepts presented in new ways
Job titles are left at the door
Build self-esteem
No finger pointing -- address the process not the individual
Rotate responsibilities
Frequently check for understanding – summarize and/or paraphrase
Include everyone in discussion – ensure everyone participates at least every hour

Do not accept the first idea – go for the second and even better the third.
Everyone is responsible for the success of the meeting
Have fun
Communicate, communicate, communicate
Don’t interrupt someone talking
Don’t shoot down ideas
Differences or conflicts are handled positively
Share your knowledge
Be honest
Ask a question when you have one – ask for an example if a point is not clear
Be a team player
Make mistakes
Have a different opinion
Confine you discussion to the current topic
Appreciate other points of view
Keep up-to-date

Facilitator Dialogue

It is very important that everyone in the meeting understand exactly what your function is as the facilitator. The first time you facilitate a group, your explanation may help lower anxiety for some members. By defining your roles and responsibilities, you create a social contract with your group. You agree to try to remain neutral and not to evaluate or contribute your own ideas, and the members agree to share the responsibility of keeping you in that role. Here is an example of how a facilitator should introduce him/herself.

"Hello, my name is ____________, and I will be your facilitator for today. As a facilitator, I will not contribute my own ideas or personal beliefs. I will not evaluate yours. My role is to help you focus your energies on the task. I am going to remain neutral and to defend you from personal attacks if necessary. I will make some suggestions, but only about the process of the meeting—ways to proceed, not matters of substance. I will be at your service during this meeting. Being a good facilitator is difficult, so please help me. If you think I am pushing too hard or manipulating you in any way, please let me know. If you correct me, I will try not to get defensive. With your help, I am sure we will have a good meeting and get a lot done." (Variations are encouraged.)

The facilitator:

- ✓ Is a neutral servant of the group
- ✓ Does not evaluate or contribute ideas
- ✓ Focuses energy of group on a common task
- ✓ Suggests alternative methods and procedures
- ✓ Protects individuals and their ideas from attack
- ✓ Encourages participation
- ✓ Helps the group find win/win solutions
- ✓ Coordinates pre and post meeting logistics

Specific Techniques:

- ✓ Clearly define your role
- ✓ Get agreement on a common problem and process before beginning
- ✓ Boomerang questions back to group meeting
- ✓ Be positive—compliment the group
- ✓ Do not talk too much
- ✓ Support the recorder
- ✓ Do not be afraid to make mistakes
- ✓ Help to educate the group

BRAINSTORMING

A group technique for generating new ideas and promoting unconventional, creative thinking in the shortest possible time.

When To Use It
Brainstorming is used to identify (1) problems, (2) causes of the problems, (3) solutions to problems, (4) steps of a process, and (5) to obtain full participation of team members.

Guidelines

- Diverge Thinking:
- No idea can be criticized. All judgement is suspended initially in preference to generating ideas.
- Thinking must be unconventional, imaginative, or even outrageous. Self-criticism and self-judgement are suspended.
- To discourage analytical or critical thinking, team members should aim for a large number of new ideas in the shortest possible time.
- "Hitch-hike" on other ideas, by expanding them, modifying them, or by producing new ones by association.
- Use a paper and pencil to record ideas…you will forget.
- Work at it.

How To Use It
Unstructured – Group members give ideas as they come to mind.
Structured – Every person in the group gives an idea as their turn arises or passes until the next round.

Steps:

(unstructured) 1. State the objective of the brainstorming session clearly and post it where everyone can see;

(structured) 2. Allow 5 minutes for everyone to record their ideas individually in silence;

3. Using either the structured or unstructured approach, ask member to contribute their ideas;

4. Record all ideas and keep them visible at all times.

HINT: ALLOW NO CRITICISM OR EVELUATION OF IDEAS

PARETO VOTE

A method to reduce a large list of ideas to a list of critical items following the concept of the 80-20 rule. (80% of the problems are due to 20% of the causes)

When To Use It

To reduce a list of brainstormed ideas to separate the vital few from the important many. This allows a team to focus on the most important issues before them.

Guidelines

Convergence Thinking:
An individual may only cast one vote per alternative
No fractional votes
Keep all tallies posted in front of the group

How To Use It

Number each item on the list.
Count the number of items in the list and multiply by 0.20 and round the number up to the next whole number to get the number of votes for each team member.
Each member places a vote on each chosen alternative until the member uses the number of votes determined in the previous step.
Tabulate the votes cast for each alternative.
Select the alternatives which have the most votes. The number selected should approximate the number of votes cast by each member.

$10 VOTING

A voting tool that allows a list of alternatives to be prioritized.

When To Use It

To prioritize and reduce a brainstormed list to a manageable size when it is important that the most important single item be identified.

Guidelines

No credit is given. Team members can only spend $10.
Team members must spend whole dollars.

How To Use It

Number each item in the list
Give each team member $10 to allocate to the chosen alternatives.
Each member should allocate a minimum of $1 up to a maximum of $5 to their selected alternative until the $10 is used.
Tabulate the “dollars spent” on the individual alternatives
Select the alternative which receives the highest “dollars spent”

CAUSE AND EFFECT DIAGRAMS

Also known as a fish-bone chart or an Ishikawa Diagram. A technique developed to identify, organize, and represent the relationship of "causes" to the effect noted as a problem.

When To Use It

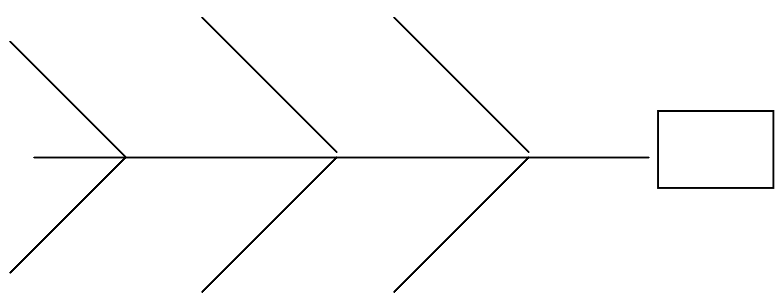
- To identify, explore and display all possible causes of a specific problem
- To structure a team's thinking

Guidelines

- Do not restrict yourself to the 4M categories
- Identify the effect as a negative statement
- Attempt to ask why five times

How To Use It

- State the effect of the major problem briefly and specifically
- Identify the 4-6 major categories such as: Manpower, Method, Machine, and Materials
- Construct the diagram by listing the effect in a box on the right side of the diagram and draw a horizontal line leading to the box
- Draw "bones" from the horizontal line and label the "bones" to represent the chosen categories



- Use structured brainstorming to develop a list of possible causes
- Place the causes in the appropriate categories

- Determine and circle the most likely causes using available data and team member expertise
- Gather data to confirm the decision

Typical Labels

People	Workers	Parts
Materials	Procedures	Methods
Process	Production	Machinery
Problem	Facilities	

FORCE FIELD ANALYSIS

A technique that views change as the result of a struggle between forces that are seeking to upset the status quo. This view is taken in the work of Kurt Lewin, who developed a technique called "Force Field Analysis". In it, Lewin proposed *Driving Forces* move a situation toward change while *Restraining Forces* block the movement. Force Field Analysis identifies the activities and/or characteristics which tend to cause and/or resist change.

When To Use It

To analyze how a desired change can be brought about within the project and/or organization

Guidelines

- Force Field Analysis help make change happen by:
- Urging people to think collectively about all the facets of a desired change, encouraging creative thinking.
- Encourages people to come to a consensus about the relative priority of factors on each side of the "balance sheet"
- Provides a starting point for action

How To Use It

- Define the desired change/action
- Brainstorm the driving forces
- Brainstorm the restraining forces
- Pareto vote the driving forces
- Pareto vote the restraining forces
- Develop an action plan to reinforce the most significant driving force
- Develop an action plan to reverse or eliminate the most significant restraining forces

HINT: Focus on minimizing the restraining forces rather than maximizing driving forces.

Can We or Can't We

Instructions: Use the worksheet on the next page to help you to answer the following questions.

The Governor has expressed his desire to implement Quality Management throughout every agency. What are the forces within the Arkansas Department of Health that will facilitate this desire? What exists today that will tend to prevent that from happening? Where should attention be directed?

Force Field Analysis

Desired Results:

Driving Forces	Restraining Forces

Probing

One facilitation technique that works well when you are trying to create a willingness in somebody to collaborate with you in a thorough, searching discussion is probing. The coalition will have a number of discussions and probing can help ensure everyone participates. In some cases the chairman can use this technique; in others you may want an outside facilitator. Other members of the team can also use this technique when they are discussing issues or trying to gather information. The following will help you determine what type of probe to use in various situations.

Probing is a communication technique for investigating or exploring a topic. When you probe, you do more than examine. You also raise the other person's receptivity. If a person's receptivity is high they are more likely to listen to other people's points. This is obviously important when you are trying to help a group reach consensus or make a decision.

Probing also helps you uncover a person's ideas and feelings. People are often uncomfortable saying what they think. This can be destructive in a group where you want everyone's opinions. If they hold them inside it can result in their reluctance to participate in the group and when a decision is reached they will be less likely to support it.

So what exactly does probing accomplish?

- Probing gets the other person to participate.
- Probing elicits information.
- Probing makes the discussion meaningful to the other person.
- Probing vents interfering emotions.
- Probing forces you to pay attention and to listen accurately.

There are three things you must do to get through to another person.

1. You must get the other person to open up – to tell you what is on their mind.
2. You must get them to continue talking, so that you learn all of what you need to know.
3. You must make sure you understand what she or he is telling you.

Open-end probes:
Open-end probes draw out the other person – get them involved – by letting them say what she/he thinks or feels about a given topic. They pull him/her into the conversation, so that it becomes a dialogue instead of a monologue. Here are some examples:

"Mary, What do you think would work best about this approach?"
"Jim, what do you think about this idea?"
"Bill, do you see any downsides to this program?"

Neutral probes:
Neutral probes are questions or statements that get the other person to expand on some aspect of a subject already under discussion. Neutral probes continue the discussion, asking for more information on the subject. Here are some examples:

"What else do you think should be done about the situation?"
"Give me some additional reasons you think this should be done."

Neutral probes:
- Enlarge the flow of information
- Get the other person to delve deeper into important topics
- Let the other person know that you're interested and that you want to know more

Brief assertions of interest:

Brief assertions of interest are very short statements that tell the other person you are listening and you are interested. For example:
"I see."
"Keep going."
"Hm-m-m-m."

Brief assertions of interest:

- Encourage the other person to keep on sharing their thoughts
- Draw out more information – usually, when the other person continues talking about a topic, she/he adds to or expands upon what has already been said
- Heighten receptivity – people are more likely to listen willingly to you when you show that you're listening willingly to them

Close-end questions:

Close-end questions are phrased so as to get very narrow and exact answers to very precise questions. Close-end questions:

- Help you get specific facts or opinions
- Help you test final commitment
- Tell you whether you're reaching for commitments too early

There are three types of close-end questions:

1. Fact-finding questions: these start with who, what, when,where, and how much
2. Commitment questions: these can be answered by "yes" or "no"
3. Option questions: these can be answered by selecting one of two or more alternatives

Leading questions:

Leading questions contain their own yes or no answers. The answer is built into or implied by the question. For example:
"You want to do that, don't you?" or "It's not worth the effort, is it?"

Leading questions help you find out if the assumption you've built into the question is correct. Use leading questions to get the other person to agree with you, but only after full discussion. If you use leading questions too early, the other person will think you are putting words into his/her mouth.

Summary statements:
Summary statements are brief statements that sum up, in your own words, information received by the other person. They show that you have absorbed what has been said and that you are now checking to make sure your understanding is accurate. Here are some examples: "Your thinking, as I get it, is that …." or "As I hear you, you said…"

Summary statements:

- Help you make sure that you've been hearing what you think you've been hearing
- Bring important points into focus, so that you and the other person can examine them together

Tell the other person whether or not she/he's getting through (your summary statement may help him/her realize that she/he's not making him/herself clear).

Dealing with Disrupters

Preventions

Try using these tips when you set up your meeting to help prevent disruptions.

- **Get agreement on the agenda, ground rules and outcomes.**

In other words, agree on the process. These process agreements create a sense of shared accountability and ownership of the meeting, joint responsibility for how the meeting is run, and group investment in whether the outcomes and goals are achieved.

- **Listen carefully.**

Don't just pretend to listen to what someone in the meeting is saying. People can tell. Listen closely to understand a point someone is making. And check back if you are summarizing, always asking the person if you understood their idea correctly.

- **Show respect for experience**.

We can't say it enough. Encourage people to share strategies, stories from the field, and lessons they've learned. Value the experience and wisdom in the room. Don't act like a know-it-all.

- **Find out the group's expectations.**

Make sure that you uncover at the start what participants think they are meeting for. When you find out, be clear about what will and won't be covered in this meeting. Make plans for how to cover issues that won't be dealt with: write them down on a flipchart and agree to deal with them at the end of the meeting, or have the group agree on a follow-up meeting to cover unfinished issues.

There are lots of ways to find out what the group's expectations of the meeting are. Try asking everyone to finish this sentence "I want to leave here today knowing…" you don't want people sitting through the meeting feeling angry that they're in the wrong place and no one bothered to ask them what they wanted to achieve here. These folks may act out their frustration during the meeting and become your biggest disrupters.

- **Stay in your facilitator role.**

You cannot be an effective facilitator and a participant at the same time. When you cross the line, you risk alienating participants, causing resentment, and losing control of the meeting. Offer strategies, resources, and ideas for the group to work with, but NOT opinions.

If you are attacked or criticized, take a "mental step" backwards before responding. Once you become defensive, you risk losing the group's respect and trust, and might cause people to feel they can't be honest with you.

- **"Buy-In" power players.**

These people can turn your meeting into a nightmare if they don't feel that their influence and role are acknowledged and respected. If possible, give them acknowledgement up front at the start of the meeting. Try giving them roles to play during the meeting such as serving as a "sounding board" for you at breaks to check in with about how the meeting is going.

- **Interventions**

Even with all your best efforts at preventing disruptions some will still arise. Try these interventions when disruptions occur during the meeting.

- **Have the group decide.**

If someone is dominating the meeting, refuses to stick to the agenda, keeps bringing up the same point again and again, or challenges how you are handling the meeting: First try to remind them about the agreed-on agenda. If that doesn't work, throw it back to the group and ask them how they feel about that person's participation. For example, ask the group if they would like to veer off the agenda to accommodate the topic this person wants to discuss. Let the group support you.

- **Use the agenda and ground rules.**

If someone keeps going off the agenda, has side conversations through the whole meeting, verbally attacks others: Go back to that agenda and those ground rules and remind people of the agreements made at the beginning of the meeting.

- **Be honest: Say what's going on**.

If someone is trying to intimidate you, if you feel upset or undermined, if you need to pull the group behind you: It's better to say what's going on than try to cover it up. Everyone will be aware of the dynamics in the room. The group will get behind you if you are honest and up-front about the situation.

- **Use humor.**

If there is a lot of tension in the room, if you have people at the meeting who didn't want to be there, if folks are scared/shy about participating, if you are an outsider: Try a humorous comment or a joke. If it's aimed at yourself, so much the better. Humor almost always lightens the mood. It's one of the best tension-relievers we have.

- **Accept or legitimize the point or deal**.

If there is someone who keeps expressing doubts about the group's ability to accomplish anything, is bitter and puts down others' suggestions, keeps bringing up the same point over and over, or seems to have power issues, try one or more of these approaches. Show that you understand their issue by making it clear that you hear how important it is to them. Legitimize the issue by saying, "It's a very important point and one I'm sure we all feel is critical." "Make a bargain to deal with their issue for a short period of time. For example, "Ok, lets deal with your issue for 5 minutes and then we ought to move on." If that doesn't work, agree to defer the issue to the end of the meeting, or set up a committee to explore it further.

- **Use body language.**

If side conversations keep occurring, if quiet people need to participate, or if attention needs to be re-focused: use body language. Move closer to conversers, or to the quiet ones. Make eye contact with them to get their attention and convey your intent. Turn your back to them and cut them off from the group. This works particularly well if the tables are arranged in a u-shape so you can walk close to them and then turn your back on them.

- **Take a break.**

If less confrontational tactics haven't worked, someone keeps verbally attacking others, shuffling papers, or cutting others off and if you have tried all of the above suggestions and nothing has worked, it's time to take a break. Invite the disruptive person outside the room and politely but firmly state your feelings about how disruptive their behavior is to the group. Make it clear that the disruption needs to end. But also try to find out what's going on, and see if there are other ways to address that person's concerns.

- **Confront in the room.**

If all else has failed, if you're sure it won't create backlash, if the group will support you, and if you've tried everything else, confront the disruptive person politely but very firmly in the room. Tell the person very explicitly that the disruption needs to stop now. Use body language to encourage other group members to support you. This is absolutely the last resort when action must be taken and no alternatives remain!

Maintaining Group Focus

Instructions:
Groups often tend to get side tracked. This can be very frustrating for the members because when this happens the meeting is less productive. Use these tips to help keep your group focused.

The most important things for establishing and maintaining group focus are:

- Establish a clear goal that is shared by the group
- Define results for each meeting (what do you hope to accomplish)
- Post an agenda for each meeting
- Create a group memory
- Have someone agree to be timekeeper and recorder

Once a meeting is in progress, maintain focus by:

- Posting the goal and desired results and referring to it as you go
- Posting a sheet labeled issues and use it to record items that would sidetrack the group from its purpose; deal with them after the meeting
- Following the agenda

Using the group memory:

- Show the group where it has been and where it is now. Ask "what's next?"
- Physically touch or point to an item on the group memory to get the group to focus on it
- Refocus the group by touching the goal (or result desired) and saying "What has that got to do with this?"

- Draw focus away from bickering by asking one person to clearly state their need, recording it, doing the same with the other, and asking "What needs to happen so both these needs are met?"

Ask questions that will help the group re-orient itself. For example, "I'm confused. Where are we?" Suggest a process and ask for agreement. For example, "Let's do a fishbone diagram and identify possible causes of this problem. Does anyone object to that?"

Facilitator Dos and Don'ts

DO

- Clarify your role from the start
- Listen and observe
- Be neutral on content
- Help the group work together to identify their desired results and develop their agenda
- Suggest methods
- Ask questions to test inferences about individual behaviors
- Check with the group to verify if they decided something or simply had a discussion
- Summarize all decisions and check the accuracy with the group
- Share your observation that the group is not following the ground rules
- Give descriptive interpersonal feedback
- Stop speakers to keep them focused on work "in the current conversation"
- Acknowledge people and their feelings; be with them in their struggle
- Appear relaxed and playful
- Encourage participation

Don't

- Assume everyone will have the same understanding of your role
- Dominate the discussion
- Push your own interests
- Identify agenda items and agenda results
- Dictate methods
- Assume you know what everybody means
- Assume everyone has the same perception of whether they made a decision or simply a discussion
- Assume everyone has the same idea of what they decided
- Give evaluative performance feedback
- Allow speakers to ramble if they are not speaking about the current conversation
- Get upset with people when they have difficulty accepting a new idea

Tips for Facilitators

Don’t memorize a script
Even with a well-prepared agenda and key points you must make, you need to be flexible and natural. If people sense that you are reading memorized lines they will feel like they are being talked down to and won’t respond freely.

Watch the group’s body language
Are people shifting in their seats? Are they bored? Tired? Looking confused? If people seem restless or in a fog, you may need to take a break or speed up or slow down the pace of the meeting. And if you see confused looks on too many faces, you may need to stop and check in with the group to make sure that everyone knows where you are in the agenda and that the group is with you.

Always check back with the group
Be careful about deciding where the meeting should go. Check back after each major part of the process to see if there are questions and that everyone understands and agrees with decisions that were made.

Summarize and pause
When you finish a point or a part of the meeting process, sum up what was done and decided. Pause for questions and comments before moving on. Learn to “feel out” how long to pause – too short, and people don’t really have time to ask questions; too long, and they will start to get uncomfortable from the silence.

Be aware of your own behavior
Take a break to calm down if you feel nervous or are losing control. Watch that you’re not repeating yourself, saying “ah” between each word, or speaking too fast. Watch your voice and physical manner. (Are you standing too close to people so they feel intimidated, making eye contact so people feel engaged?) How you act makes an impact on how participants feel.

Occupy your hands

Hold onto a marker or pen but don't click the pen or constantly take the cap on and off the marker. Some people hold on to the back of a chair. Just don't do this so long that it looks like you are glued to it. Don't play with the change in your pocket, a necklace or something else that distracts the group. Also do not put your hands in your pocket and leave them there either. You will look stiff.

Watch your speech

Be careful you are not offending or alienating anyone in the group. Use swear words at your own risk! Remember the diversity of your group – age, sex, race, etc.

Use body language to your advantage

Using body language to control the dynamics in the room can be a great tool. Moving up close to shy, quiet participants and asking them to speak may make them feel more willing because they can look at you instead of the big group and feel less intimidated. Also, walking around engages people in the process. Don't just stand in front of the room for the entire meeting. Body language can also help you deal with disrupters.

Don't talk to the flip chart, blackboard, or walls

Always wait until you have stopped writing and are facing the group to talk. It may be difficult for people to hear you if you do not. They may wonder if you are talking to them or yourself. If possible use something other than a blackboard. They can be hard to read and messy.