Meeting Roles

Facilitator

The facilitator contributes structure and *process* (that is, the design of the meetings) to interactions so that groups are able to function effectively and make high-quality decisions. A facilitator uses the process and delivery to support others and enable them to achieve their goals (related to the content). The facilitator moves the meeting along and keeps it focused.

Leader

The group leader serves as a team captain in meetings; the leader is often a content expert. Often, the leader provides meeting direction: purpose, goals and objectives, and desired outcomes and/or outputs. Typically, the leader convenes the meeting and has—or establishes—accountability.

Facilitating Leader

This is the position that National Oceanic and Atmospheric Administration (NOAA) educators and extension agents often find themselves in. We may have this dual role—facilitator and team/group leader—in many of the meetings we organize and/or attend. When this is the case, it is important to find the balance between these roles that is most appropriate for the situation or topic under discussion. In this dual role, educators or extension agents may not be neutral on the issue; however, they can still follow all of the facilitation practices described in this workshop in order to promote effectiveness in meetings and progress toward achieving the group's goals and objectives.

Recorder

The recorder documents the meeting: the process, decisions, actions taken (or to be taken), and outcomes. The recorder also documents the subsequent implementation of any action plan that is established in the meeting.

Participants

The participants provide input, discussion, and feedback on the topics at hand (*content*) and on the process. For example, they might provide process feedback about whether or not the meeting is being run in a way that will allow the issue to be addressed or resolved.

Process Observer

The process observer provides feedback to the facilitator and the team leader on the process to help fine-tune it. During the meeting, the observer may assess the process by asking himself/herself questions such as: Is the pace appropriate? Are all participants involved? What roles are various participants playing? Are the decision-making tools appropriate?

Process versus Content

Process

The *process* is the structure, framework, methods, and tools used in all interactions between people. These include interactions that are formal (meetings and professional) and informal (personal). Process also refers to the climate or spirit established in meetings, as well as the style of the facilitator.

Content

The *content* is the topic or subject being discussed at the meeting. Content includes the task, agenda items, decisions made, and issues explored.

Content **The What**	**Process** **The How**
• Subjects for discussion • Task • Problems being solved • Decisions made • Agenda items • Goal	• Methods and procedures • Relations (and their maintenance) • Tools being used • Rules or norms set • Group dynamics • Climate

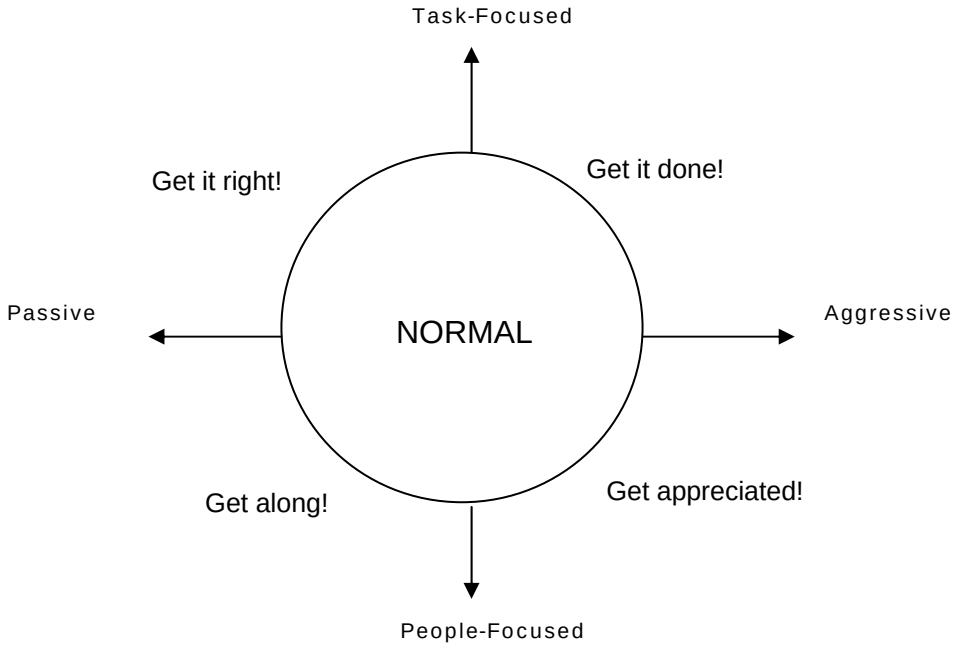
Handling Challenging Members at Meetings

Every association and workplace has at least one difficult person. This is the member who complains, but rarely offers solutions; the convention delegate who stands up and spends 45 minutes lambasting the officers and directors; or, the board member who goes off on his or her own, speaking for others without the authority to do so. Fortunately, difficult members are few. Unfortunately, the havoc they wreak can be quite large.

If you have ever had to face a difficult group member, you know how frustrating—and potentially demoralizing—the experience can be. But there are general strategies and specific techniques to help you cope. By understanding them and adopting a constructive response yourself, you can influence the behavior of the difficult person—making the group environment less strained and more productive.

Motivating Factors for Different Personalities

When dealing with different personalities, it helps to reflect on the motivating factors that drive the actions of these individuals. Personalities can range from passive to aggressive and from people-focused to task-focused. The illustration below (Brinkman 1994) shows the motivating factors that relate to these greater character traits.



Interventions

When a person's behavior begins to disrupt a meeting, workshop, or other event, the facilitator should be prepared to intervene. In the language of facilitation, an intervention is "any action or set of actions deliberately taken to improve the functioning of the group." This may be necessary if anyone with the described personality types is present, or if:

- someone isn't listening,
- side conversations are going on,
- people are interrupting each other,
- someone uses a sarcastic tone during a debate or discussion,
- people's comments get personal, or
- the discussion is getting off track.

Intervening is like holding up a mirror to the group so that participants can see what they're doing and take steps to correct the problem.

Regardless of its length and complexity, an intervention is always an interruption. The facilitator must stop the discussion and draw attention to an aspect of the process—how relations are maintained, the rules or norms, group dynamics, or the meeting's climate. The facilitator's goal should be to minimize the interruption by resolving the situation as quickly as possible. You may do this by 1) ignoring the situation, 2) discussing it privately with the person during a break, or 3) intervening.

Always be cautious about whether or not you intervene. If you intervene every single time there's a distraction or problem with any member of the group, you might be interrupting too frequently. You should keep a watchful eye for repetitive, inappropriate behaviors that don't seem to resolve themselves.

The following questions may help you decide whether it's advisable to intervene:

- Is the problem serious?
- Might it go away by itself?
- How much time will it take to intervene? Do we have that much time?
- Will the intervention be more disruptive than the problem?
- Can the intervention hurt the climate?
- Do I know the people well enough to do this?
- Is it appropriate, given their level of openness and trust?

Do I have enough credibility to do this?

The 3-Step Intervention Strategy

Interventions need to be worded carefully, so that they do not make the situation worse. There are generally three distinct components to an intervention statement:

Step 1: **Describe** what you're seeing ("Hold up a mirror"). This is nonjudgmental and doesn't attribute motive. It's based solely on observations of actual events. For example, "Allen and Sue, both of you have left and returned three times during this meeting."

Step 2: **Make an impact statement.** Tell members how their actions are impacting you, the process, or other people. Base this on actual observations. For example, "We had to stop our discussion and start over again on three occasions, because of your comings and goings over the last hour."

Step 3: **Redirect** the person's behavior(s). This can be done by:

- Asking members for their suggestions about what to do. For example, "What can we do to make sure this doesn't happen again?" or "Would everyone like a short break so that when we return, everyone will be able to fully participate?"
- Telling members what to do. For example, "Please either leave, or stay for the rest of the meeting."

Special note: Step 2 can be omitted, if the impact statements may be interpreted as laying excessive guilt on the offending parties. You'll need to use your best judgment to determine whether this step is necessary. A good rule of thumb is to use the impact statements when the offensive behavior is persistent or repetitive, and previous intervention attempts have been ignored.

A Few Examples of the 3-Step Intervention Strategy

As you'll see in these examples, the three steps of the intervention strategy don't have to be used in the order presented, and in some cases, the impact statement can be omitted, or worded in an indirect way.

When someone is being sarcastic:

"Ellen, I'm afraid your good ideas aren't being heard **(impact),** because of the tone of voice you're using **(describe)**. How about stating that again, only in a more neutral way **(redirect)**?"

When one person is putting down the ideas of another:

"Joe, you have been saying 'yes, but' after every suggestion Carol has put on the table **(describe)**. I'm going to ask you to explore these ideas by asking a few questions, to make sure you fully understand them before dismissing them **(redirect).** It will make Carol feel more like she's being heard **(impact)**." Another way to deal with this is to ask the person to paraphrase what the person they'd criticized had said **(redirect)**.

When one person dominates the discussion:

"Al, you always have lots of valuable ideas **(describe)**, but we need to hear from the other members of the team **(indirect impact**).** Would you please hold your comments until the end (or for a few minutes), so other people can be heard **(redirect)?**"

** Avoid saying things like “No one else gets a chance to speak.” Instead, stay more neutral, and say, “Others need to be heard.”

(Bens 2000, page 216)

Types of Difficult People and Strategies for Handling Them

Part of being a leader involves motivating problem group members to become more effective participants. The list of typical problem members is long and varied; there is no simple classification system. The same individual may have different motivations and reactions depending on the topic being addressed or the timing of discussions. Some problem members change tactics in mid-stream. The key to handling difficult people is to identify stereotypical behavioral patterns and suggested responses for leaders to help them move through a meeting under challenging circumstances.

The next section contains the following suggestions for handling difficult and outspoken people at meetings: (1) stereotypes of some typical, difficult personalities, (2) tips for dealing with specific, difficult people at meetings, and (3) general strategies for interventions.

The Stereotypes

1. Complainer/Negative: The Crab

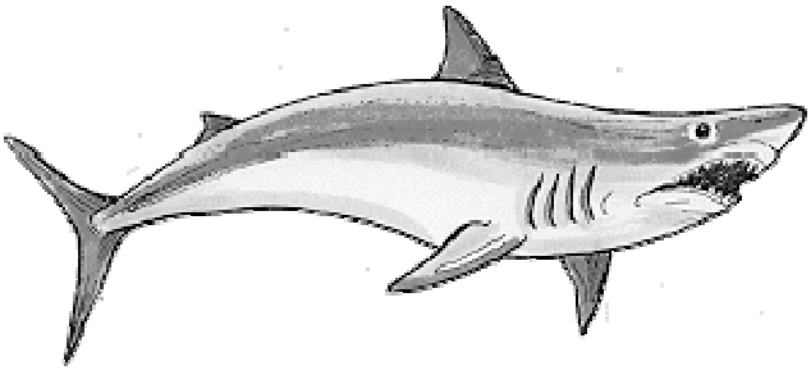
The complainer can come in many forms: whiner, critic, or obstructionist. Despite the negative connotation, this is a person often motivated by perfection (that is, this person becomes dissatisfied when nothing can meet the perfection he or she needs). Negative, complaining people object to everything, asserting that ideas proposed will not work or are impossible. They may completely deflate any optimism others have for a project and may block others from accomplishing goals. Crabs gripe and do little to improve the situation—either because they feel powerless, or because they refuse to bear the responsibility for a solution.

Suggestions for Dealing with the Complaining, Negative Crab:

- **Listen actively**, even though it will be very difficult. Interrupt complainers who are repeating themselves.
- Acknowledge what the complainer says by **paraphrasing** the complaints.
- **Stay neutral**. Do not agree with the complaints. Do not get drawn in. Avoid the accusation-defense-accusation sequence (that is, where you defend an accusation and then are re-accused); the cycle is unending.
- State your own realistic optimism.
- **Ask questions** that will clarify specifics from the complainer.
- **Summarize**. State the facts—without comment and without apology.
- Switch to problem solving, but do not hurry the solutions. **Ask** for “ways to help” in order to shift the focus to solutions.
- Be prepared to go through this strategy from the beginning several times; complainers are slow learners.
- Play on the complainer’s ambitions: recognize his or her knowledge and experience and use it.
- People who always say “no” can be a resource. They may serve as a “smoke detector” and point out potential problems to be addressed.

2. Dominator/Hostile: The Shark

Hostile, aggressive, dominating, and intimidating people try to bully and overwhelm others by bombarding them. They make cutting remarks or throw temper tantrums when they do not get their own way. The motivating factors may vary by the type of aggressive behavior shown. Some hostile individuals will be task-focused and want to get the job done while maintaining control. These individuals will generally have a more focused attack on the failure of others to complete a specific task or take necessary actions. Others may explode and attack other people in a more random fashion, which is typically done to command attention.



Suggestions for Dealing with the Dominating, Hostile Shark:

- **Stay neutral**, but firm on the process. Stand up for yourself and others, without being threatening.
- **Listen actively**. Give them time to vent and run down.
- Get their attention carefully. An easy interruption is simply to call the person by name.
- Try to reduce the intensity of the encounter. Just having them sit down will make them less aggressive. Call a time out if it is needed.
- **Stay neutral**. Don't attack back. Avoid a head-on fight.
- **Ask questions**. Try to get at the root cause of their aggression.
- Be prepared to be friendly. Hostile-aggressive people are often very friendly after you have stood up to them and "earned their respect."
- **Paraphrase**. Reflect what has been said, and **ask questions** to show you can move forward together.
- Use the ground rules.

3. Scrapper/Trouble Maker: The Jellyfish

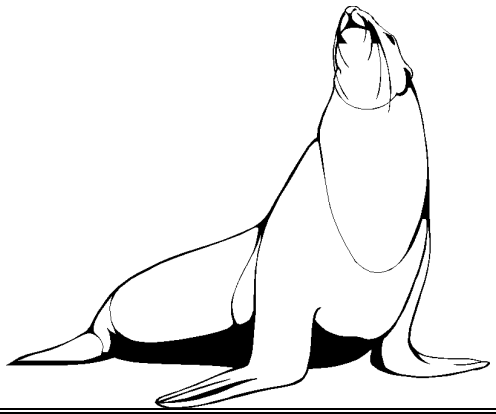
The scrapper is another version of the hostile, aggressive, domineering type. Scrappers are full of "fire." With their stinging remarks, they tend to be expressive, blunt, and confrontational. Their comments are sometimes argumentative—and sometimes their comments only appear argumentative. The scrapper enjoys a good fight and finds debating and intellectual games challenging and rewarding.

Suggestions for Dealing with the Trouble-Making Jellyfish:

- **Stay neutral**!
- **Paraphrase**, using a soft voice and patient, reasoned statements. Acknowledge their **positive** contributions.
- **Ask questions** that focus their comments on the issue (rather than the people).
- **Paraphrase**, and preface answers to the scrapper with remarks such as:
  - I see that you feel strongly about this because . . .
  - I see your point that . . .
  - Perhaps we could think of several ways of handling your concern that . . .
- Set time limits on discussions. **Summarize**, and move on when appropriate.
- **Ping-pong**. Let others help address the person, if appropriate.
- Use the ground rules.

4. Know-It-All/Arrogant: The Sea Lion

Know-it-all experts believe—and want others to believe—that they have unsurpassed command of information. They also believe that they have the right values and correct opinions. With cockiness and an inflated ego, they are frequently condescending, imposing, pompous, or arrogant toward others. In all likelihood, the know-it-all will make you feel like an idiot.

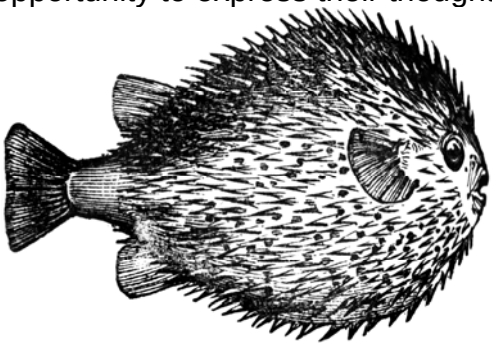


Suggestions for Dealing with the Know-It-All Sea Lion:

- **Listen actively** to them and acknowledge what they say.
- **Ask questions**, but do not confront them. They hate being wrong.
- **Stay neutral**. Avoid being a counter-expert.
- Let them be the expert they think they are (Warden 1983).
- **Summarize**, and then use the phrase “yes, and . . .” to move on.
- **Ping-pong** to the group, and let them deal with the know-it-all’s theories.
- Give them space and time to express thoughts.
- Arrange to give them the arena they desire.

5. Talker/Motor Mouth: The Blowfish

These people have a tendency to talk too much (almost compulsively) and dominate the "floor-time" at the expense of other group members. While they frequently have good ideas and strong contributions to make, they also ramble, monopolize the discussion, and do not give others an opportunity to express their thoughts.



Suggestions for Dealing with the Talking Blowfish:

- **Listen actively**, and recognize **positive** contributions.
- **Label sidetracks**. Interrupt tactfully by saying their name.
- Use ground rules, **parking lots**, and the agenda to limit this person's speaking time.
- Point out concerns. Create awareness that the talker is monopolizing time by suggesting that others should have the opportunity to express opinions: "I'm concerned we're not hearing from everyone...."
- **Ping-pong** the discussion back to the group.
- Offer them a particular responsibility to give them a feeling of importance and belonging, so that their energies need not be put into talking.

6. Super Agreeable/"Yes Man:" The Sea Otter

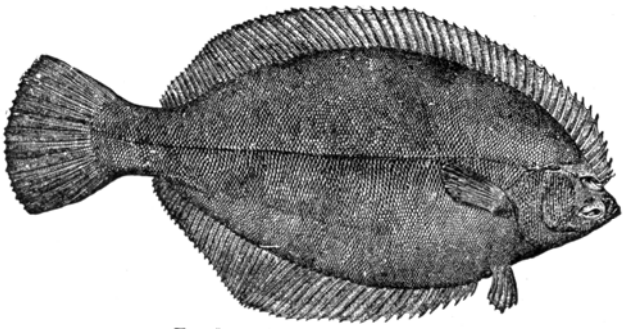
Super agreeable, overly positive people are optimistic, very reasonable, sincere, and supportive. They are people-oriented, and aim to please those nearby (for instance, by always saying "yes"). They seek approval by giving approval. Sometimes they may cause difficulty in group situations because they over-commit or are unreliable.

Suggestions for Dealing with the Super-Agreeable Sea Otter:

- **Listen actively** for over-commitment or contradictions.
- **Paraphrase**, so that they are aware of what they are saying.
- **Ask probing questions** that will make honesty easy. Don't allow them to make unrealistic commitments, when you know they couldn't possibly fulfill them. Ask specific questions about what it will take to fulfill commitments.
    - What needs to be done?
    - How long will it take?
    - What other projects are you working on?
    - Do you have any other ideas about how we can do this?
- Take advantage of their acting and people skills; they truly aim to please.
- **Ping-pong** to the group.

7. Under-Participator/Apathetic: The Flounder

These people have little to say in a group setting, possibly because they are not interested or are not comfortable speaking in the current setting. The under-participator does not appear to be engaged in the group or its formal discussions, but may say more during breaks at meetings. The group member who remains under-involved may be an exceptional listener, a deeply reflective individual, or someone who is simply detached from the subject.

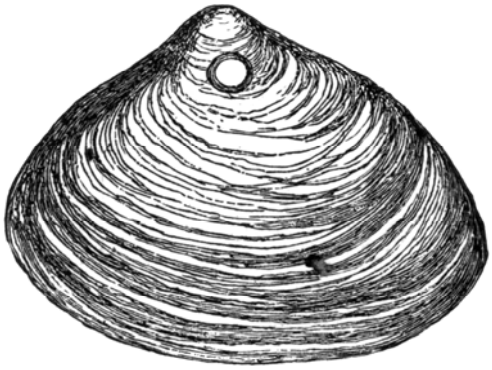


Suggestions for Dealing with the Apathetic Flounder:

- **Ask questions**.
- **Listen actively**. Don't rush to fill in a response.
- **Paraphrase** their statements to ensure that everyone hears them, and acknowledge their contributions.
- Use facilitation tools and techniques (such as small group discussions, roving flip charts, and anonymous brainstorming) that make participation easy.
- Contact the person individually, if needed.

8. Shy/Quiet: The Clam

Silent, unresponsive people answer every question or plea for help with a short answer: yes, no, I don't know, or a merely a grunt.

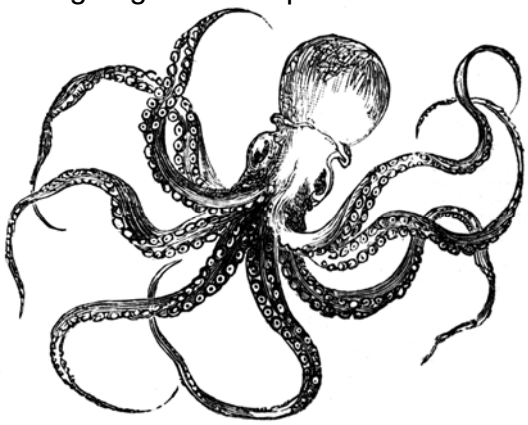


Suggestions for Dealing with Shy, Quiet Clam:

- **Ask open-ended questions**.
- **Listen actively**. Pause for long periods, inviting them to fill the void.
- Use processes that will give them time to think about their responses.
- Acknowledge their participation.

9. Indecisive: The Octopus

Indecisive people are frequently procrastinators, and they can cause difficulties by holding back comments and decisions (or failing to take action). These people may add roadblocks to project implementation, or cause conflict when decisions are made that they disagrees with. Indecisive people are often motivated by perfection; they may want to spend more time to get things right than is practical.

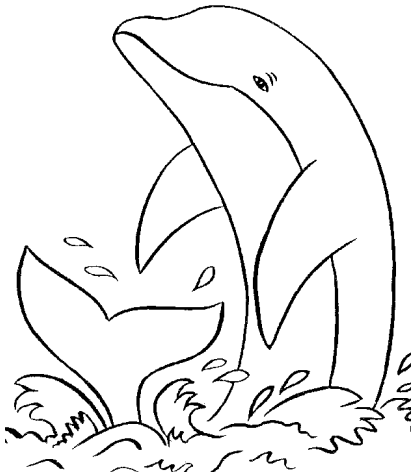


Suggestions for Dealing with the Indecisive Octopus:

- **Ask questions**. Bring the issues out in the open, and make it easy for the indecisive person to be direct.
- **Paraphrase** to illuminate the dilemma.
- **Stay neutral**! Don't favor or promote one side or decision.
- **Ask clarifying questions** to help them think through the decision.
- Use the process to help prioritize alternatives.
- Support and acknowledge when they do make decisions.
- **Ping-pong** the dilemma to the group.

10. Entertainer/Comedian: The Dolphin

Entertainers are largely uninvolved in the substance of group efforts; instead, they make unrelated jokes and comments. Entertainers may divert attention from the subject under discussion with distracting antics; however, they also can play a significant, constructive role when group discussions become tense and stressful for group members.



Suggestions for Dealing with the Entertaining Dolphin:

- **Ask specific questions**.
- **Stay neutral**.
- **Summarize** and **ping-pong** to the group to refocus the discussion.
- **Listen actively**. Valuable information and contributions may be hidden in the jokes.
- Reward the person when he or she contributes appropriately.