

# Meeting Resources & Facilitation Tips

Federation of Community Councils  
February 2025

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## INTRODUCTION: COMMUNITY MEETINGS

Like it or not, meetings are how we come together to get discuss and make decisions about things. If we all had a nickel for every unproductive meeting we sat through we might all be rich. Here are some ideas to help meetings be more productive, efficient a better use of our time.

Experts say there are three main tasks in every meeting. These are:

- Information sharing
- Decision making
- Social activity

A good question to ask a group is what percentage of a meeting each task should take. People will guess many different percentages, but the experts feel that:

- Information sharing should be 30%
- Decision making should be 70%
- Social activity should take place before and after the meeting, not during it.

This is not what generally happens though. Groups who have gone to this 30/70 model have expressed how much more they get done and even how much more time is available to bring up new ways to achieve the groups mission. This alleviates “wasted” time, keeps the group focused on why they are there, and creates time to think and be creative.

Try this for yourself for a few meetings of your group or organization.

One way to do this is to use a timed agenda. Here is a sample format for a 90 minute meeting.

- I. Call to Order - No time
- II. Approval/Corrections of Minutes - 1 minute
- III. Reports - Officers/Staff/Committees - 29 minutes
- IV. Business - 60 minutes
  - a. Special
  - b. Unfinished
  - c. New
  - d. Other
- V. Adjournment

While there is a tendency for reports and presentations to take up a lot of Community Council meeting time, it is worth asking the membership:

- Do you want meetings to be mostly informational, consultations, or collaborations?
  - Are presentations and reports given opportunity for membership discussion after the informational portion?

- Are membership given opportunity to take action on what they learn about?
- Are reports and presentations more important, less important, or equal to community conversation?
- Are questions from membership after reports more information sharing or decision making?
- Are there other ways to facilitate information being passed than lengthy reports?
- What new business could be brought forward if membership had more time to work together rather than listen?

## MEETING EVALUATIONS

Here are some tools to help evaluate meetings. To learn what needs improvement, encourage membership to fill out an evaluation. Convene a committee to discuss the results and make recommendations for improvements. Present to the full membership and vote on those as group agreements, by-law changes, or policy implementations.

### Version A

	Yes	No	Maybe
<b>Content: Was the group's common focus on...</b>			
The purpose			
The kind of meeting			
The topic			
The problems to be solved or decision to be made			
A meeting agenda			
Reports or Information Updates			
Information needed for decision- making			
Problem definition			
Problem analysis / data gathering			
Generating Alternative Solutions			
Choosing criteria by which to decide			
Final decision-making			
Feedback during the meeting			
Implementation			
	Yes	No	Maybe
<b>Process: Was the group's common focus on...</b>			
The process of the meeting			
How the meeting would proceed			
How the decisions would be made			
	Yes	No	Maybe
<b>The Chair/Group Leader:</b>			
Maintains an open, safe, balanced atmosphere			
Protects individuals from attack			
Maintains conversation flow			
Encourages everyone to participate			
Helps the group/individuals agree on where they want to go before they start			
Feeds back information to the group/individual for clarification			
Suggests alternatives and procedures			

Helps role definition of groups/individual in the meeting			
Maintains everyone's roles and responsibilities as clear and agreed upon for the duration of the meeting			
<b>Timeframe:</b>	Yes	No	Maybe
Clearly agreed on timeframe for the meeting			
Start and end on time			

**Version B**

	Very Low	Low	Average	High	Very High
Orientation	1	2	3	4	5
Group Atmosphere	1	2	3	4	5
Interest and Motivation	1	2	3	4	5
Participation	1	2	3	4	5
Productiveness	1	2	3	4	5
Clarity of Questions	1	2	3	4	5
Overall Meeting Rating	1	2	3	4	5

Please comment with specific examples on the following:

1. What did you like?
2. What change(s) would you suggest for the next time?

Meetings are important and critical to effective community efforts. The preceding are a few tools to help make them more enjoyable, efficient, and productive.

Meetings and facilitation skills for them are critical to getting people together and having productive ideas and their implementations. The skills needed to do this are as much art as science.

## **THINGS TO OBSERVE IN YOUR MEETING**

Use these questions to evaluate and make intentional choices around your meeting format and content. Consider ideas from the membership on ways to improve.

1. **PHYSICAL ARRANGEMENT AND DISCOMFORT**
  - a. Is the seating arrangement suited to the size of the group, the purpose, and the method used?
  - b. Are ventilation, heating, and lighting arranged for comfort?
  - c. Are the chairs comfortable?
  - d. Can members see and hear each other clearly?
  - e. Have distracting noises been avoided or eliminated?
  - f. Are the activities and rest periods well timed?
2. **ORIENTATION**
  - a. Do the group members have a clear idea of what the goals and objectives are?
  - b. Do the group members have a clear idea of how the group is to go about achieving these objectives?
  - c. Do they know what they are expected to do and what they can expect from the leader?
  - d. Is some provision made for the group to see how it is progressing during the meeting?
3. **GROUP ATMOSPHERE**
  - a. Do members feel free to express their ideas; to agree and disagree?
  - b. Is the atmosphere friendly, indifferent, or hostile?
  - c. Is the group open-minded? Do they seem interested in drawing in new points of view?
  - d. Do members respect points of view different from their own?
  - e. Does the procedure tend to be formal or informal?
4. **COMMUNICATION**
  - a. Do the members of the group speak clearly and loudly enough for everyone to hear?
  - b. Do the members of the group and the resource people express their ideas in words that everyone can understand?
  - c. Are all members trying to communicate relevant ideas?
  - d. Do the examples illustrate points with which most group members have had some experience?
5. **INTEREST AND PARTICIPATION**
  - a. How interested are the group members?
  - b. Do they seem to feel that the objectives are important?
  - c. Did they help select the objectives?
  - d. Does the discussion carry into the breaks and continue after the meeting?
  - e. Is there evidence or extra preparation of extra voluntary study?
  - f. Does the interest remain high?

## 6. PARTICIPATION

- a. Are all of the members involved in what is going on?
- b. Have all members made some contribution?
- c. Do the leaders and the most active members make it easy for the less vocal members to express their opinions?
- d. Is discussion usually directed to the group as a whole?
- e. How is the quality of participation? Are members really digging into the topic?
- f. When questions are directed to the leader, does he refer them to the group?

## 7. TEAM WORK

- a. Do members try to preserve group unity and move toward the objective?
- b. Do the members take responsibility for keeping the group moving toward its objective?
- c. Does the leader take responsibility for redirection when it is needed?
- d. Are the leaders and members willing to give major credit to the combined team?
- e. Are the leader and the group members sensitive to the feelings of other members?

## 8. PRODUCTIVENESS

- a. How far has the group moved toward its objectives?
- b. Was a summary made so the group could see its accomplishments.
- c. How does the group feel about the amount and quality of its accomplishments
- d. How much time was wasted on unimportant or unrelated topics?
- e. How do the group's accomplishments compare with what one or two individuals could have done?
- f. To what extent have the contributions added to the knowledge, skills, or attitudes of its members ?
- g. Did the group members learn something that they feel will be useful to them?

## 9. CHOICE OF METHODS

- a. Were the methods used the best that might have been chosen?
- b. Would other methods have saved them, made for greater interest, made for more participation, or have produced more?
- c. Were the methods changed to fit the particular purpose and situation or was the same method used for everything?
- d. Does the group know how to tackle a problem systematically?
- e. Has the group had experience with enough different methods to make selective choices feasible?
- f. How well did the leader adapt the methods to the experience of the group?



## PRE-MEETING CHECKLIST

Set your meeting up for success by going through this quick checklist and making sure you are ready to begin!

- Have you set concrete, realistic goals?
- Have you invited presenters or experts on topics of interest?
- Is the site familiar, accessible, representative, and adequate?
- Do you have a Chair for the meeting?
  - Has the Chair been involved in preparing the agenda or been fully briefed?
- Does the agenda:
  - Accomplish the goals
  - Encourage commitment and involvement
  - Provide visible leadership roles
- Did you send the FCC the final agenda and meeting handouts for publishing 7 days prior to the meeting?
- Do you need printed:
  - Agenda
  - Minutes
  - Meeting Handouts
  - Resolutions
- Do you have officers to serve as:
  - Chair
  - Vice Chair
  - Secretary
  - Treasurer
  - FCC Delegate
  - Other (As outlined in by-laws)
- Have you considered the following logistical matters?
  - Chair arrangements
  - Projectors, OWL, or other hybrid arrangements
  - Sign-In Sheets
  - Printouts

## **GROUND RULES & GROUP AGREEMENTS**

It is imperative that ground rules be established and enforced to ensure fair and equal opportunities to participate for all. These may or may not have to be brought up at the first part of a meeting. Many groups use these as a rule and do not like to have them put out front. Some take it as an insult. But some groups do not work as well as others. Part of your job as a facilitator is to read a group and know when ground rules have to be explicitly brought up and when it is not necessary to do so.

All Community Councils use Robert's Rules as the de-facto ground rules, but your Council can work together to add ground rules that align with the Council culture.

### **Three Ps - Basic Ones for All**

1. NO PERSONALITIES - focus on issues not persons
2. NO PROFAN(E)ITY - do not let people profane one another- decorum in debate
3. HAVE (P)FUN - most critical, make it fun

### **For The Participants**

1. One person at a time talks
2. All get a chance to talk
3. Questions to get clarification
4. Do not criticize others
5. Review ideas to find commonalities
6. Feelings discussed rationally

### **For The Facilitator**

*These basic ground rules will help keep groups on track and out of trouble.*

1. People are comfortable
2. Discuss ground rules
3. Communicate at level of participants
4. Be neutral
5. Keep a positive group atmosphere
6. Allow think time
7. Avoid leading, loaded, lengthy comments

### **Some tips to help build a cohesive group:**

- Members talk freely
- Commonalities emerge as the focus
- Each person has a role
- People accept each other
- When trust arises, bonding takes place
- Group culture emerges

### **Some Guidelines for Handling Difficult People in Groups**

Difficult people are always a problem. Some general guidelines in handling them are:

1. Recognize a problem early. Be prepared to respond.
2. Help the group arrive at group-recognized operating procedures.

3. Recognize the behavior is goal-oriented.
4. Reject the behavior, but not the person.
5. Recognize the problem may be both an individual and a group problem.
6. Help the person find an appropriate way to participate.
7. Recognize that conflict can be constructive as well as destructive.
8. Assess your own behavior in reaction to the behavior of the difficult person.
9. Stay neutral, do not get personally involved.
10. Know your own conflict management style; understand other styles.
11. Remember that prevention is the best insurance policy.

### **Keys to Consensus**

Consensus is a group decision-making process where people generally agree without formal votes. It recognizes that all are equal in the group and decisions are based on common group ends. Some keys are:

- Decisions and discussion are goal centered
- All members heard equally
- Communication is open
- All alternatives are explored
- Information is shared openly
- All implications of a decision are examined

### **5 C's**

- Courtesy - politeness is paramount
- Conciliation - the ability to give something up is fostered
- Cooperation - an atmosphere of cooperating is maintained
- Compromise - people are willing to compromise
- Coordination - everyone knows what everyone else is up to

### **Adults and Effective Meetings**

In designing meetings for adults, here are several things to keep in mind:

- Adults have lots of experience and want the chance to share it. Give them the opportunity to do so.
- Adults have bodies that need to be comfortable. Get a meeting space that allows for that.
- Adults need food and drink. This is a primary rule for the success of community meetings.
- Adults are prideful. Do not insult them in public.
- Adults have tangible things to lose. Focus on gain, not loss.
- Adults have reflexes toward authority. Let the group be its own authority.
- Adults need reinforcement. Provide it.
- People need a vacation. Give them one.
- People have strong feelings. Let them be expressed positively.
- People don't like to be left behind. Keep everyone up to speed.
- Adults are not generally comfortable with change, but they can change.
- Adults are people with a past. Use it.
- Adults have ideas. Let them be contributed.

## **ENGAGING MEMBERSHIP**

Group members may choose functional roles with behavior required for a) task/work roles, and b) relationship/ maintenance roles; or c) individual roles with behavior that does not contribute to either.

### **Group Members' Roles & Functions**

1. Group task roles
2. Group building and maintenance roles
3. Individual roles

Each of these types of roles has many roles in each of them.

### **Group Task Roles**

1. INITIATOR-CONTRIBUTOR - Starts the ball rolling
2. INFORMATION SEEKER - Constantly wants the answer
3. OPINION SEEKER - Wants to hear opinions, not facts
4. INFORMATION GIVER - Cites authoritative facts
5. OPINION GIVER - Gives one's own opinions
6. ELABORATOR - Spells it all out
7. COORDINATOR - Tries to pull it all together
8. ORIENTER - Keeps group on track
9. EVALUATOR-CRITIC - Sets standards
10. ENERGIZER - Prods the group
11. PROCEDURAL TECHNICIAN - Expedites group moves
12. RESOURCE PERSON - Provides info and resources
13. LEADER - Takes initiative

### **Group Building or Maintenance Roles**

1. ENCOURAGER - Praises and is warm/fuzzy
2. HARMONIZER - Creates harmony
3. COMPROMISER - Moves halfway
4. GATE-KEEPER - Encourages participation
5. STANDARD SETTER - Sets standards
6. GROUP OBSERVER - Keeps watch/records
7. FOLLOWER - Goes along/gets along
8. CLARIFIER - Helps clarify
9. HELPER - Enabler/discussion leader

### **Individual Roles**

1. AGGRESSOR - Attack mode
2. BLOCKER - Negative and difficult
3. RECOGNITION SEEKER - Pay attention to me
4. SELF-CONFESSOR - Personal revelations
5. PLAYBOY - Nonchalance and cynicism

6. DOMINATOR - I am in charge
7. HELP SEEKER – I need sympathy
8. SPECIAL INTEREST PLEADER – Mine is most important
9. DODGER - Volunteers others
10. TEACHER - I know the answer

Observing the role a person is taking in a group and focusing on that behavior and how it affects the whole group is a good way of depersonalizing destructive behavior and addressing it in a nonthreatening way. Many times, this technique has brought groups to monitor themselves and focus on role and not individual behavior. Often one group member will remark to another, "there you go, playing that role again." This is often followed by laughter and that person playing a more positive part in group processes. Focusing on roles and not individual behavior is a very powerful tool in moving groups forward in a positive way, preserving group harmony, and avoiding hurt feelings.

### **Group Task Roles**

A group has many needs to remain functional. Some of these are (in no particular order):

- Good give and take
- Finding hidden agendas
- Easy rapport
- Focus on common issues
- Keeping interest high
- Constructive conflict resolution
- Everyone works
- Keeping members
- Recruiting members
- Cooperation
- Excellent communication
- Community support
- Team building
- Openness
- Newcomers made to feel welcome
- All feel a part of the group
- Trust
- Clearly identified goals
- Good group processes
- Adequate thought time
- Alternatives explored
- Depersonalization of conflict
- Results Commitment
- Motivation
- Solving problems

TASK / WORK ROLES	RELATIONSHIP / MAINTENANCE ROLES	INDIVIDUAL ROLES
<b>Initiating:</b> proposing tasks, goals or action. Defining group problems, suggesting a procedure.	<b>Harmonizing:</b> attempting to reconcile disagreements, reducing tension, getting people to explore differences.	<b>Aggression:</b> defining others; status, attacking the group or its values; joking in a barbed or semi-concealed way.
<b>Informing:</b> offering facts, giving expression of feeling giving an opinion.	<b>Gatekeeping:</b> helping to keep communication channels open; facilitating the participation of others, suggesting procedures that permit sharing remarks.	<b>Blocking:</b> disagreeing and opposing beyond reason, resisting stubbornly the group's wish for personally oriented reasons. Using hidden agenda to thwart the movement of the group.
<b>Clarifying:</b> interpreting ideas or suggestions, defining terms, articulating issues before group.	<b>Consensus testing:</b> asking to see if a group is nearing a decision, sending up a trial balloon to test a possible conclusion.	<b>Dominating:</b> asserting authority or superiority to manipulate group or certain of its members; interrupting contributions of others; controlling by means of flattery or other forms of patronizing behavior.
<b>Summarizing:</b> pulling together related ideas; restating suggestions; offering decisions or conclusions for group to consider.	<b>Encouraging:</b> being friendly warm, and responsive to others, responding by facial expression to others' contribution.	<b>Out-of-field behavior:</b> making a display of one's lack of involvement; abandoning the group while remaining physically with it; seeking recognition in ways not relevant to group tasks.
<b>Reality testing:</b> making a critical analysis of an idea; testing an idea against some data; trying to see if the idea would work.	<b>Comprising:</b> when their own idea or status is involved in a conflict offering a compromise, which yields status; admitting error; modifying to promote group cohesion.	<b>Avoidance:</b> pursuing special interests not related to task; staying off subject to avoid commitment. Preventing group from facing up to controversy.

## GROUP PHASES

These are some excellent diagnostic tools for figuring out where a group is and how you can help move it forward.

Group Phase	Key Processes	Ups	Downs	Leader Behavior
<b>Forming</b>	<ul style="list-style-type: none"> <li>- Orienting</li> <li>- Getting acquainted</li> <li>- Setting direction</li> <li>  Setting goals</li> <li>- Defining tasks</li> <li>- Taking first steps</li> </ul>	<ul style="list-style-type: none"> <li>- Meeting new people</li> <li>- Clarity</li> <li>- Organization</li> </ul>	<ul style="list-style-type: none"> <li>- Anxiety</li> <li>- Confusion</li> <li>- Too Much/Too Soon</li> </ul>	Directing
<b>Storming</b>	<ul style="list-style-type: none"> <li>- Reassessing</li> <li>- Exploring options</li> </ul>	<ul style="list-style-type: none"> <li>- Fun</li> <li>- Excitement</li> <li>- Diversity</li> </ul>	<ul style="list-style-type: none"> <li>- Tension</li> <li>- Conflict</li> <li>- Bottoming-Out</li> <li>- Loss of members</li> </ul>	Coaching
<b>Norming</b>	<ul style="list-style-type: none"> <li>- Resolving</li> <li>- Evaluation</li> <li>- Decision-making</li> </ul>	<ul style="list-style-type: none"> <li>- Cohesion</li> </ul>	<ul style="list-style-type: none"> <li>- Group think</li> </ul>	Supporting
<b>Performing</b>	<ul style="list-style-type: none"> <li>- Implementing</li> </ul>	<ul style="list-style-type: none"> <li>- Closure</li> <li>- Completion</li> <li>- Synergy</li> </ul>	<ul style="list-style-type: none"> <li>- Foot-dragging</li> <li>- Social loafing</li> </ul>	Delegating
<b>Transforming</b>	<ul style="list-style-type: none"> <li>- Regrouping</li> <li>- Disbanding</li> <li>- Letting Go</li> </ul>	<ul style="list-style-type: none"> <li>- Time for new activities</li> <li>- Reenergize</li> <li>- Satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>- Holding on</li> <li>- Sadness</li> <li>- Sense of loss</li> <li>- Disappointment</li> </ul>	Variable

## FACILITATION PROCESS TIPS

- ❖ Arrive early and set up.
  - Check the room layout is appropriate.
  - Socialize with folks.
- ❖ Introductions
  - Warming up - get folks involved right away.
  - Names and "why" here or ask another question to get conversation going.
- ❖ Remind of the group of ground rules or group agreements.
- ❖ Engage membership in the process.
  - Observe, observe, observe.
  - Listen, listen, listen.
  - Recap or rephrase and let people know where they are in the process.
  - Equal opportunity to participate for all who wish to.
  - Recognize the "roles" being played.
  - Keep alert for "hidden agendas" and manipulators.
  - Let "flow" go naturally.
    - You know you are doing a good job when you have little to do.
  - Use "natural" transition opportunities.
  - Deal with "behaviors" not personalities.
  - Use the group to monitor behavior.
  - Be willing to "change horses" in the middle of the stream.
  - There is more than one way to skin a cat
  - Do reality checks often.
  - Clarity checks often.
  - Keep yourself out of it.
  - Anticipate and be proactive on problems.
  - Engage a co-facilitator for hybrid meetings or to pick up when you can't be present.
  - Encourage conversation, not debate.
  - Remind members of curtesy and decorum in debate.
  - Engage timekeeper when needed.
- ❖ Wrap up the meeting.
  - Review the whole process
  - Summarize what was covered.
  - What next? Assign or review roles for what is to follow after the meeting.
- ❖ Comments
- ❖ Evaluation
- ❖ After the meeting, follow up as needed and prep for the next meeting.



## **HOW TO USE A PAPER EASEL FOR FACILITATED MEETINGS**

One of the most overlooked skills of the art of facilitation is how to use an easel and paper to record the group's efforts.

### **I. Supplies**

Have a full easel pad and one backup for every session, many colors of pens, and masking tape for each facilitator. If room is small, ask for odorless pens.

### **II. Recording Tips**

- Write legibly, about one or one and a half inches high
- Number ideas
- Number each sheet
- Use exact words; do not edit. But help people find the right words
- State basic ideas, without writing every word
- Ask participant if you captured the theme in your summary
- Do not worry about spelling
- It is okay to abbreviate
- Make sure writing is dark
- Use a different color to mark or group similar ideas
- Remain neutral if part of facilitating team

### **III. Posting Tips**

- Get permission to put pages on wall using masking tape
- Post in order
- Put a second sheet under a posted page to avoid marking the wall when adding more information
- Take sheets down in order so they are easy to transcribe for the group
- Transcribe ASAP and send out to all group members

### **IV. Summary Tips**

- Walk around room where sheets are posted in order to show flow of work
- Use flow to show how much has been accomplished by group
- Use as a way to summarize
- Use as a way to help group determine what happens next
- Use as a visual aid in demonstrating what occurred in that session.

Facilitation is as much art as skill. Remember this, keep yourself out of the way, let it be fun, go where the group wants, and build consensus. This should keep you safe.

## **DISAGREEMENT IN A GROUP**

There are reasons why we may not always get along with someone and some why we do. Examining your own feelings toward someone may help alleviate group tensions.

Think of times you didn't disagree with what a person said to you, but you felt resentful or put down about what was said. What were the reasons?

1. I didn't like the person
2. They were indirect, not forward
3. I wasn't being understood
4. They were too demanding
5. They dictated to me
6. I was told, not asked
7. Sometimes the truth hurts

Have you ever strongly disagreed with someone, and come away having enjoyed it even though you didn't win? What were the reasons?

1. I respected the other person
2. I felt they had a right to their own opinion
3. They respected themselves
4. We were equals
5. We cared for each other
6. Mutual respect
7. Trust

## **CLOSING - BUILDING THE SKILLS FOR A HEALTHY COMMUNITY**

There are many skills needed to build a healthy community. This section has looked at just a few of them, but these are some of the most needed if a community is to take the healthy community approach.

The preceding skills will help both community workers and community members. The more people in a community who gain these essential skills, the better off the community will be.

The idea of building long-term capacities that give communities the opportunities to manage their own affairs now and in the future is one that needs to be explored in much more depth in the years to come.

The approach to communities that focuses on community building and community discovery rather than just on community development is one that will help communities sustain their health into the future.