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# Practicing OD

## Facilitation is More Than Running Good Meetings

Minahan, Matt

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Some in our field will tell you that facilitation is about running a good meeting, and that a thorough knowledge of 'How to Make Meetings Work' (Doyle and Strauss, 1976) is sufficient.

And, I have a different belief. I believe that the knowledge needed to make a meeting work well goes way beyond meeting management, and includes a strong relationship with the client, a grounded knowledge of the context in which the meeting is occurring, a range of knowledge and skills about human behavior to rely on during the preparation and planning of the meeting, a good sense of self during the meeting itself, and a bit of grace and care at follow-up and exiting. That's a lot more than just managing a good meeting!

As a field, I don't think we've figured out a way to enhance that complex behavior set called 'facilitation skills' yet, though Judy Vogel and I do hope to do some of that at the 08 OD Network Conference in Austin, TX. However, I do think that, whether you are already an experienced facilitator or are just now considering giving it a try, our field would benefit from a conversation about the core theories and fundamental concepts that are necessary for good facilitation. Being adept at making presentations or delivering training is certainly helpful in being a facilitator, but it's far from enough to make you good at it. Relying on your instincts when you're in the middle of a project team meeting may work a few times, but it is definitely not adequate as a long term success strategy for doing good work with groups.

In fact, good facilitation is an art; it requires some very specific skills, as well as good judgment and intuition. You began acquiring them some time ago, and may not even have been aware of it at the time. And, like any good tool, they need a bit of refreshing now and then – rather like that worn out box of your favorite well-used magic markers! They are the core tools and techniques that support your success as a facilitator. In this article, I'd like to highlight one core perspective for facilitation -- the importance of observing, thinking, and

intervening at multiple levels.

## **Multi-level Thinking and Preparation**

Even though most of your work will be occurring at the group and organizational levels, it is important to be aware that, for your clients, the hard emotional work is likely occurring at the *intrapersonal* level, within themselves. They'll be wrestling with what's going on inside themselves, what they stand to gain or lose, how they choose to participate, what they choose to communicate, if and how they assert themselves as leaders, and many others. We can't, and probably shouldn't, be dealing with everyone on these matters, but we need to be aware that they are 'up,' and be prepared to deal with them one on one, if needed.

At the *interpersonal* level, your clients will be working through their feelings about the leadership of the organization, the project leader, others on the team, and you. There will be questions about who can be trusted, to whom what information can be disclosed, with whom people choose to interact – or not! It is hard to avoid, and it can be very seductive of us, drawing us into these kinds of issues, but the more we allow that to happen to ourselves, the less time and energy we have for the real systemic issues.

At the *group* level, there are always questions about inclusion, especially at the beginning of the group's life, when the issues are around who is in the group and who is not; our job as facilitator is to make sure that the membership is clearly defined and the terms of participation in the exercise are clear to all. There is another set of issues around who is in the lead, and who is in control. Sometimes, that's the same person, and sometimes, leadership and control are distributed within the group. In either case, our role is be sure that the choices are made thoughtfully and explicitly, that they best support the work of the group, and that we observe and comment on any mismatch or ineffectiveness in how the group is managing. Another set of group-level issues has to do with the atmosphere or way that the group does its business. As facilitators, we're looking to see if the group has the right structure, process, communication, and planning to do the work well, and we make observations and/or recommendations when we see a particularly good match or a mismatch with the group's purpose.

At the *organization* level, the facilitator's role is to pay attention and be ready to intervene on questions about the context in which the group is doing its work, and the fit between the group's work and the larger organization in which it resides. Most of the time as facilitators, our job is to verify that the client is well grounded in what the work should be, and that the work that the group is doing is aligned and consistent with the larger goals and directions of the organization as a whole. Alignment of purpose and function is a key variable when we're working at the organization level, and it's often where political agendas, such as power and resource control and hidden agendas, show up across units.

The multi-level perspective is critical before, during and after the meeting. Your knowledge of what's important and the common dynamics at each level *in relation to the purpose of your*

*meeting* can inform not only your design, but also your facilitation plan. Each level is operating simultaneously, yet you need to be ready for whatever moves into the foreground or potentially 'facilitate' in such a way that you can structure and anticipate what surfaces and what level you need to work on.

## **Reference**

Doyle, M. & D. Strauss (1976). *How To Make Meetings Work*. New York: Berkley Publishing Group.