

FACILITATING TASK GROUPS

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Counselors are regularly asked to facilitate a wide-range of task groups including case consultations, community advocacy/improvement/action groups, volunteer project groups, multi-disciplinary staffing and conferences, special project committees, staff meetings, and professional association boards and committees...to name just a few. Task groups share many dynamics and characteristics of counseling groups, however the primary difference is that task groups exist for a purpose – to deliver a specific “business” outcome. Task group facilitation is the art of bringing our understanding of group process to “business” rather than “clinical” purposes.

GROUP FACILITATION

To make the process – the movement – of group interactions and efforts easy, convenient and productive

TASK GROUP

Any group of people who come together for the purpose of achieving a definable outcome

TASK GROUP FACILITATION

To make the interactions and efforts of people who come together for the purpose of achieving a definable outcome easier, more convenient and productive.

GROUP FACILITATION SKILLS

- **Listen**

Listen with your whole body – you ears, your eyes, your mind and your heart. Let your non-verbal behavior communicate that you are fully with the other person. Look them in the eyes nod and smile. Prove that you are listening by responding to the speaker’s comments and recording their statement as necessary.

- **Validate & Support**

Affirm and validate everyone for her/his contribution. When people are complemented for sharing, they are more likely to feel comfortable and share again. Comments like the following encourage productive exchanges.

Phyllis, thanks for sharing your ideas.

Yes, Hector, those are the kind of ideas that get us thinking.

- **Restate for Emphasis**

Restate the speaker’s message as you are recording their contribution. This feedback technique communicates respect to the speaker and ensures that you have captured the spirit and intent of their message.

- **Clarify & Paraphrase**

If the speaker’s message is unclear...provide your best understanding of their idea. Express your understanding very tentatively. This will provide you and the speaker with room to gracefully be corrected if you missed the message. The goal is to achieve a clear message from the speaker that is understood by everyone.

- **Observe**

This is your most powerful group management tool. It is through observing that you fulfill the traffic cop function of the facilitator. Observe means you are constantly aware of all the dynamics within the group – who is talking and who is not – who seems confused – who seems engaged and who has drifted off – and who is upset or anxious. Observe also means that you comment on what you observe and ask whether it is contributing to the effectiveness of the group. Examples include;

I've noticed that Carmen has been quiet on this topic, what would you like to add?

Ben, you seem to be upset about something. Are you having trouble with this idea?

Well...Juan seems to have lots of ideas, how about someone else.

Carver, I'm not sure that you are hearing John. Why don't we ask John to say it again.

- **Focus & Refocus**

Keep the discussion focused on the specific topic. When the discussion strays and/or someone becomes too long-winded, gently redirect the discussion back to the topic. Refocusing comments like the following can be helpful.

We seem to have drifted off the topic. Can someone remember what we were discussing?

Let me stop us for a moment and restate the issue.

Excuse me, I have a question; is this discussion moving us forward?

- **Mediate**

Disagreement and conflict are inevitable and often necessary for good ideas to surface. Personality differences sometimes flare and group members often feel very strongly about a particular issue. Facilitators must intervene to deal with conflict. Intervene by slowing-down the dialogue and encouraging each member to spend as much energy listening as they are speaking. Ask each party to the conflict to restate the position of the other person. Once the situation is rational, ask the group; Can anyone see how these apparent different points of view might be brought together? Broaden the discussion and attempt to find some middle ground. However, don't try to pretend that the disagreement or conflict will magically go away if it is ignored. If it can't be resolved in the group, arrange for a private meeting. If you believe you are in over your head, get help to mediate the private meeting.

- **Summarize**

Summarization is a tool that facilitators use as discussion unfolds as well as at the end of the meeting. From time-to-time during the meeting, summarize the discussion thus far. This allows everyone to catch-up and get on board. It also permits the facilitator to draw discussion to a close when it is clear that the group is "looping" (saying the same thing over and over). Summarize is also appropriate as each agenda item is accomplished and at the conclusion of the meeting.

Example:

- *Before we get any deeper into this – let me take a minute to summarize what we have said thus far so we are all on the same page.*
- *It seems that point has been made – it is clear...*
- *I think we have come to agreement. Let me recap what everyone has agreed to do.*

TASK GROUP DIMENSIONS

BELONGING

The first thing most people need when they join a task group effort is to determine whether they “fit” in the group. People are likely to ask themselves:

- *Who are these other people?*
- *Do they really want me in the group?*
- *Do I really want to be here?*

Members may introduce themselves or the facilitator may introduce each member.

The result of the introductions should make it clear what each member of the group brings to the group – the role, function, or expertise that has necessitated each person to be a member of this task group. If members are new to each other provide nametags until the group is well established.

PURPOSE

Don't assume that members understand the purpose of the group. People often come to their first meeting only knowing that they are “supposed” to come. People often come with very basic questions in mind:

- *What is this group all about?*
- *What are we supposed to accomplish?*

Sometimes the purpose of the group has already been defined, when that is the case; the facilitator restates the purpose so that everyone is on the same page

- *We are here today to...*

Other times the purpose has not been defined or is unclear; or the purpose has been defined but the facilitator wants to give members time to talk about the purpose to increase buy-in to the efforts of the group.

- *Before we can begin we need to get clear on the purpose of this group/meeting. Let's talk about it and see what we can determine. Who has an idea?*

EXPECTATIONS

People cannot meaningfully contribute until they fully understand what is personally expected on them. They need answers to important questions;

- *How am I supposed to help?*
- *What is expected of me?*

Provide an opportunity to talk about the expectations that will be placed on each group member. It is essential that each person understands their role and how it contributes to the accomplishment of the purpose of the task group. Clarifying expectations is an on-going process and will likely need attention at most every meeting in the early stage.

OUTCOME

How will success of the group be determined? What is the specific outcome, (e.g., recommendation, plan, product, etc.) that will define the success of the task group? The facilitator's role here is to help group members arrive at a shared understanding of the target outcome. If all members have a clear picture of the target, facilitating the efforts of individual members as well as the group interaction will be much easier.

We have talked about the purpose of our group, the ground rules of our work together, and about the special talents, skills and perspectives each of you bring to our task – now, before

we launch into the specifics of our work, we have one more very important decision to make. We need to agree on the specific outcome we are seeking – how will we know we have been successful? What is the final outcome we are seeking from our efforts together? Let's talk about that and see if we can all come to a shared understanding.

GROUND RULES

Groups function best when they establish a set of ground rules that will guide the behavior of the group members. Ground rules are best created by the members rather than imposed by the leader or some external source. Introduce the concept of ground rules by saying something like;

It might be helpful before we get down to work to take a few minutes to talk about some ground rules that can make our work together more productive and more enjoyable. Let me suggest that we all offer our ideas. It's probably best that we not judge the suggestions as they are offered. I'll write them on the board and we can discuss and explore each idea after the list is complete. Now, who would like to begin?

Depending on the type of task group, examples of ground rules could include;

- Everyone participates
- Meetings begin and end on time
- One person speaks at a time / no side conversations
- Agenda is prepared for each meeting
- Minutes or summary of each meeting is prepared by....

Sometimes the Ground Rules discussion is held before Outcomes are defined, other times the Ground Rules are more easily arrived at after there is clarity and agreement about the desired outcome.

DEVELOP / IDENTIFY RESOURCES

The facilitator needs to always be thinking ahead – what additional resources (materials, information, people, expertise) will be needed to deliver the outcome? The facilitator need not take this responsibility on entirely alone, but rather be willing to regularly ask group members to assist in identifying both the needed resources and the possible location of the resource.

ACTION PLANNING & IMPLEMENTATION

At some point the task group moves from general discussion to decision-making and then to action planning and implementation. If the group gets stuck in the general discussion stage, realization of the target outcome is not possible. Members become frustrated, group disinterest and disintegration will likely occur. With the assistance of the process facilitation skills outlined above, the group arrives at a decision point. Members are ready to set goals and define action strategies that will move the efforts of the task group closer to the realization of the target outcome. The facilitator must now shift from facilitating general discussion to helping the members become as specific and detailed in their planning as necessary in order that actions may be implemented.

DELEGATION & ACCOUNTABILITY

All along the way group members are given specific responsibilities. Task group success is the dependent upon every member accepting responsibility and delivering on delegated assignments.

Delegation that is facilitated as compared to delegation that is ordered takes on a different tone. The facilitator “encourages” and “invites” participation and acceptance of responsibility. Comments from the facilitator such as the following are common:

- *We have come to a decision point – you are clear about what needs to be done next. How do you want to go about deciding who will be responsible?*
- *Brad, you have spearheaded the discussion on this issue, would you be willing to take responsibility to make this happen?*

Accountability is critical to the accomplishment of the task group. But facilitated accountability is also different from chain-of-command monitored accountability. The difference is not about being permissive – but rather about how the accountability measures are languaged and implemented. Comments from the facilitator may include:

- *Let me stop our discussion as ask you to think about the ground rules that we established at the start of our work together. Do the ground rules as the currently exist give us any guidance on how we will hold each other accountable for delivering both the results and the quality we are committing to deliver? If so, let’s review what we agreed to, if not, do you think it would be useful to talk about accountability?*
- *Thank you for agreeing to take this responsibility, can we set up a due date and if necessary some status updates along the way so we are all kept abreast of the progress you are making? What would work best for you?*

MONITOR / COORDINATE PROGRESS

It is the responsibility of the facilitator to monitor and coordinate the progress of the task group. This means remaining on top of all the delegated assignments – checking in, asking questions, offering support and encouragement. During task group meetings it means taking a few minutes to summarize the status and progress of the effort thus far – noting the areas where the group is on schedule and those where things are lagging. It means making the observation and asking the question:

- *We seem to be falling behind...having difficulty with...struggling with...What do we want to do about that?*

OVERCOMING BARRIERS

Every project inevitable runs into barriers – people don’t meet deadlines, members leave the group and are not replaced, new members join the group and want to take the efforts in a different direction, resources are unavailable, other priorities “push aside” the sense of urgency associated with the task, as well as innumerable other contributions from the real world. The issue isn’t the existence of a barrier – barriers are to be expected. The issue is the effort and skill the facilitator brings to organize and energize the task group to overcome the barrier

HANDLE REWARDS & SACRIFICES

Rewards and sacrifices are subjective experiences; what one person perceives as a reward may be seen by another person as a sacrifice. None-the-less, the facilitator is responsible for remaining mindful of the fair distribution of the rewards and sacrifices associated with group membership. In volunteer task groups this is particularly difficult because too often a small core subgroup shoulders the majority of the work while all members want a healthy helping of the rewards. Effective facilitators take special efforts to spread around the workload and the sacrifices so no one member or small group is unfairly burdened.

COORDINATE PRODUCTION OF FINAL PRODUCT

The purpose of the task group is not complete until the final product is delivered in the form requested. The facilitator must remain on top of this final stage as too often group members have a tendency to “move on” before bringing everything to closure. Facilitation skills are never more important than during the final push to completion.

MAINTAIN A "CAN DO" ATTITUDE

The facilitator sets the tone and serves as a model during the life of the task group. Facilitators with an obvious “can do” attitude provide a constant source of encouragement and energy that members can draw upon during times of frustration or challenges to the integrity of the group. Task group success involves both head and heart – the facilitator who can manage the process and encourage the heart is in deed gifted.

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