TEACHING FACILITATION: A PLAY IN THREE ACTS

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The trend toward teams and teamwork continues to increase. Many organizations are replacing traditional, hierarchical structures in favor of diverse, autonomous teams (Cohen, 1993) that can develop new products, solve problems, and improve processes in ways more quick, innovative, and cost-effective than ever before.

Despite reports of the phenomenal successes enjoyed by some work teams (e.g., Pine & Tingley, 1993; Plumb, 1993; Schilder, 1992), other teams experience failure (e.g., Mulvey, Veiga, & Elsass, 1996). Taking their cues from exemplar organizations, some organizations foray into "teaming" without adequate knowledge or preparation. These organizations fail to realize that "simply bringing together a group of professionals does not ensure that this group will function effectively as a team or make appropriate decisions" (Cooley, 1994, p. 6).

Complicating this teaming trend is the increasing diversity of the workforce (Jackson, 1991; Johnston & Packer, 1987). The challenges faced by a group of individuals working together are often magnified under the influence of diversity (gender, ethnicity, and functional specialization). Such diversity is believed to increase the potential for innovation and creativity in team outcomes; however, much research shows that such gains are often offset by process losses (e.g., Watson, Kumar, & Michaelsen, 1993). When indi-

viduals work together on a task, they cannot help but see the world from their own perspectives (e.g., as a woman, an African American, an engineer), at the same time ignoring or misunderstanding viewpoints of other team members. Team members who possess stereotypical perceptions of others' competence and abilities, different languages and styles of communication, and diverse methods for problem solving often have difficulty in reaching agreement (Ancona & Caldwell, 1992; Cox, Lobel, & McLeod, 1991; Dougherty, 1992; Wall & Nolan, 1986). Even nondiverse or homogenous teams have the potential for miscommunication and misunderstanding; however, this potential becomes exponentially elevated as a team's diversity increases (Jackson, 1991). Differences in gender, ethnicity, functional specialization, and personality among team members, unless understood and managed, can negatively affect team processes and outcomes (O'Reilly & Flatt, 1989; Wall & Nolan, 1986). Because the benefits of diversity—the synergistic combination of multiple perspectives (Adler, 1991)—often come with a cost, it becomes essential for organizations to provide resources that can enable diverse teams to collaborate more effectively while minimizing related costs.

The Case for Facilitation

How can an organization ensure effective group functioning? One way is to provide teams with trained process consultants or facilitators. By focusing on a team's internal processes (e.g., communication, decision making, and problem solving), or how members collaborate to accomplish its goals, facilitators can assist the team in achieving stated outcomes. Research suggests that although not necessarily ends in themselves, effective processes are critical to achieving successful outcomes (Cooley, 1994). On diverse teams, communication and other processes are hindered because of demographic and functional differences. Members find it hard to actively and objectively listen to and search for agreement with their diverse counterparts.

To facilitate means "to make easier" (*Webster's*, 1984), and through their actions, facilitators work with teams to help them more effectively achieve their stated goals. Facilitators generally attend to such team processes as meeting management, decision making, problem solving, and conflict resolution (Sisco, 1993). Aside from "teaching the group how to collect data," facilitators "may intercede if the team tries to solve a problem before defining what it is or if someone's ideas aren't being heard" (Sisco, 1993, p. 63). Their roles may not be confined to what happens during meetings; many facilitators work outside meetings to further group cohesion (Sisco, 1993) or help gain sponsorship or support from key groups or individuals external to the team

(Ancona, 1990). Although facilitators' responsibilities may vary with respect to teams' expected outcomes, technical requirements, and employee makeup, they often do whatever it takes to help a team improve its processes (and outcomes). This might start with helping a team clarify and "buy in" to its goals and objectives and progress through coaching the team to present its recommendations to management and eventually implement these recommendations.

A key facet of facilitator expertise is communication. Skilled in both verbal and nonverbal communication, facilitators are able to decode important cues that team members, who are generally more concerned about outcomes than processes, often miss. Subtle indications that members do not understand or do not want to understand another's diverse point of view, feel threatened by other members, or see themselves as unattached to a team and its goals are usually ignored or overlooked by fellow team members. Such signals may be deemed unimportant or unrelated to the task at hand. The adept facilitator, however, can highlight and focus the group's attention on such cues and their implications. For example, a team member who participates infrequently or isolates himself or herself (physically and psychologically) at team meetings might not seem problematic; however, as an experienced facilitator knows, such behavior might indicate that team member's lack of ownership of the team and its goals. Unchecked, this behavior can resurface later, often in the implementation phase, in the form of uncooperativeness or sabotage, and it can possibly lead to the downfall of a team.

In addition to process expertise, some facilitators possess specific content or technical knowledge (e.g., an engineering background) that might potentially benefit a team. However, because their primary responsibility is to ensure open and objective discussion of diverse perspectives, facilitators typically will downplay content knowledge for fear of being perceived as nonobjective or vested in a particular outcome (Sisco, 1993).

Another potential benefit of facilitation involves the opportunity for team members to learn and use the process skills modeled by the facilitator. Consistent with Bandura's (1977) social learning theory, a facilitator who models critical team behaviors (e.g., active listening, honest and direct communication, and providing appropriate behavioral feedback) plays a key role in helping team members develop and use these process skills more effectively. A facilitator's actions, including the effective modeling of teaming behavior and reinforcing of team members' effective behaviors, can eventually serve to assist a team in becoming self-facilitating (Cummings & Worley, 1993).

In sum, facilitators can provide multiple benefits for both the team and the individuals who make up the team. Team processes are improved in the short term, and team members are better equipped to deal with team-related issues

downstream. Of course, the company receives the benefits in the form of the valued outcomes a well-functioning team typically produces.

Teaching Facilitation: The Prologue

Facilitation skills can be learned (Cummings & Worley, 1993). I have successfully used the facilitation simulation described below in industry (supervisory and nonsupervisory employees) and in academe (undergraduate and graduate students). Students taking part in this activity report an increase in their facilitative and teaming skills as a consequence of the highly experiential and realistic nature of the exercise.

Typically, the teaching of facilitation skills follows one or more sessions devoted to the use of and need for organizational teams and team building. Students need to have a good sense of the benefits and drawbacks of teaming (cf. Scholtes, 1988) and preferably have had some experience working on teams. This "grounding" could be obtained through a discussion or brainstorming session. The instructor would begin by asking students, "How many of you have worked or played on a team before? If your experience was positive, what made it positive?" The instructor should search for student answers describing such ideas as team members knowing their goals and having the skills to achieve them, collaborating instead of competing, having a good coach or manager, and feeling good about the team and its outcomes. The instructor might follow these questions with one such as "If your team experience was negative, what made it negative?" Student responses to this question might include references to infighting, a bad coach or manager, and unclear or unachieved goals. The instructor should solicit as many responses to these questions as necessary to facilitate students' ability to differentiate team processes (the "hows") from outcomes (the "whats"). This differentiation is crucial to understanding the roles and responsibilities of a facilitator.

If students lack experience in teams, an instructor might ask whether students have had unproductive meetings and, if so, what they perceived to be the causes. Student inputs to this discussion are likely to center on issues of meeting management (not having a purpose or agenda), lack of focus on the task, excessive squabbling over the issues, or other process impairments. Again, the need for facilitation should become apparent.

At this point, there should be some discussion of what facilitation is and what role facilitators play in improving the functioning of teams and their meetings. The following list presents a sampling of a facilitator's responsibilities:

- to help teams run effective meetings, solve problems, and resolve conflict;
- to model and teach teaming and facilitative skills;
- to encourage teams to be self-managing;
- to encourage teams to coordinate with and present to related stakeholders (e.g., management, customers, suppliers); and
- to work oneself out of a job (i.e., by teaching and modeling effective facilitative behaviors, the group should eventually become self-facilitating and no longer require the services of the facilitator).

One might then discuss the difference between group outcomes or content (reasons for the team's existence, what the team is talking about) and group processes (how the team is going about achieving its formal tasks, including who talks to whom and how decisions are made). Facilitators should focus primarily on assisting the team with its process (as opposed to the content) by intervening when necessary to refocus a divergent discussion, ensure balanced participation, and clarify whether all options have been objectively evaluated. To do this effectively, facilitators must first be keenly aware of their strengths, weaknesses, and biases. Without this self-awareness, a facilitator's ability to set aside his or her personal needs (e.g., power, being liked by group members) or goals for the good of the group and organization may be limited (Johnson & Johnson, 1997). Other skills of a facilitator include the needs to

- listen carefully to what is being said;
- be sensitive to nonverbal communications, including emotions and silence; and
- pay attention and be able to respond to stages of team growth (e.g., arguing may be a normal part of team development that may not require intervention), communication patterns (e.g., do some members monopolize the conversation while others remain silent?), decision-making processes (are decisions made by consensus or majority rule, and do members accept the outcome?), and role behaviors (Schein's [1988] task-related, maintenance-related, and dysfunctional behaviors).

Students receive several handouts that are designed to augment and reinforce facilitation concepts. One of these lists a sampling of role behaviors (Schein, 1988; see Appendix A); students should know what they are doing (e.g., harmonizing, consensus testing, dominating), how they might help or hinder a team, and as necessary, appropriate responses. Students also receive a compilation of "problem people" (e.g., the "eager beaver," the "stand pat"), which includes detailed descriptions and potential responses to these behaviors (see Appendix B). The last handout contains a sampling of facilitative interventions (see Appendix C). One example is the "play dumb" intervention. When a group has lost its focus or has become sidetracked on another

topic, a facilitator might say something such as "I'm confused. What were we supposed to be discussing now?"

Prior to the simulation, each student is assigned one of the couple dozen interventions from this handout and asked to present the intervention to the class. For this presentation (2 to 3 minutes total), each student will describe the intervention, discuss how and why it would be used, and demonstrate its use to the class (or small group). The student who presents the play dumb intervention would explain the technique (e.g., "To get a group back on track, a facilitator will act lost and confused and request the team's help in leading him or her back to the issue at hand."), why it is used (e.g., "When the group has gotten sidetracked, playing dumb can help get the group to focus on its own process and how to improve it. It has the dual benefit of regaining the group's focus while simultaneously improving their ability to be self-facilitating."), and demonstrates its use (e.g., "I'm not sure where we are; were we discussing new employee orientation?"). If time does not permit intervention presentations by all students, have students get into groups of five or six and take turns presenting to one another. Then, each group can present a single intervention to the class. By teaching others the interventions, students become "experts" at one or more interventions and build their confidence using these techniques prior to the more intense simulation.

Teaching Facilitation: Act I

The facilitation simulation is designed to provide adequate realism, time, and feedback for students to practice their facilitation skills. In terms of realism, there are several components in the simulations. First, students are separated into groups of five or six (a typical work team size) and given small breakout rooms (if available) to have their meetings. Second, the group members are given information to guide them in the meetings they are about to have. The content of the various meetings is dictated by the pages of a booklet, each of which describes a team situation or objective.[1] Each meeting or round, led by a different facilitator, provides a different set of challenges that are appropriate for the ability and experience levels of the students. Some situations appeal to and are realistic for undergraduates with limited work experience. One example of this is as follows:

Parking at (your university) has always been something of an issue for students. Many students can't find parking near their classes, and fines for parking in the wrong place are exorbitant. What suggestions does your team have for improving this situation—to be implemented in the short term (within the next

year) and in the long term (within 1 and 3 years from today)? Mr. or Ms. (fill in name for added realism), manager of parking, would like your team's recommendations by the middle of next semester.

Other situations are geared toward students with more work experience. One example of this type of situation or meeting is as follows:

> Your team—an ethnically diverse group of male and female employees who range in age from 21 to 59, most high school graduates but some with 2 years of college—has been assembled by the vice president of operations of a large, Fortune 500 company that has just embraced "teaming." Customer complaints about your products and services have risen over the past few years, and it is the vice president of operations's hope that teaming can turn that trend around. Your team's task is to come up with recommendations for how to implement teaming in the customer service division, one of 10 divisions in this company.

The third element of realism is achieved by requiring all but one student (the facilitator) in the small group to augment their "group member" roles by displaying behaviors suggested by a role card picked at random before each meeting begins. Some of these roles are intended to create a challenge for the facilitator (e.g., the monopolizer, who dominates the conversation, or the complainer, the team's "wet blanket"), whereas other roles may be helpful (e.g., the gatekeeper, who helps balance participation) or neutral (e.g., be yourself). (See Appendix E for a complete list.) The instructions to student role players are as follows:

- Don't show anyone your role card.
- Really get into your role, but don't go overboard. (Remember, you will have your turn as facilitator soon!)
- Make any assumptions you need to make about the task at hand.
- Ad lib as appropriate.
- After establishing your role, *do* allow yourself to be facilitated, especially if the facilitator is effectively dealing with your behavior. If you feel the facilitator is not effectively dealing with your behavior, you may continue to "act up."

The timing of the simulation will vary depending on the size and duration of the class in which it is used. With 30 students in a 75-minute class, I split the class into six groups and rooms, each containing 5 students. Four 17-minute rounds are held one day, and the fifth and final 17-minute round is held during the subsequent class. The number of rounds is equal to the number of students in each room and group; it takes this many rounds for each student to have his or her turn as facilitator. The plan for each 17-minute round looks like this:

- Decide who will facilitate for that round; all other students are "group members" for that meeting and should each pick a role card. You might also consider appointing a timekeeper to ensure adherence to the schedule.
- Spend about 8 minutes holding the meeting. (Refer to your "book" of meeting assignments; there are six different meetings, one for each round plus an extra.)
- Spend about 4 minutes giving feedback to the facilitator. (The facilitator should begin by sharing things he or she said or did that worked well and things that could be improved. Then, each of the group members should take turns directing his or her feedback to the facilitator using specific examples of behaviors that were effective and those that could be improved.)
- Spend about 4 minutes to continue the meeting, getting right back into the meeting as if a freeze frame had just expired. This time allows the facilitator to utilize the group's feedback to improve his or her performance for the second segment of the meeting.
- As appropriate, spend about 1 minute giving additional feedback.

The timing of these rounds could easily be extended, particularly for more advanced students; however, shortening the time is not suggested. Each successive round requires a new meeting and a new facilitator; all other students in the breakout room are "team members" who will be role-playing specific roles while working together on the subject of the meeting. By rotating the facilitator role and changing the meeting content, each student practices and receives feedback on his or her facilitative skills, observes and gives feedback to others doing the same, and practices teaming behaviors in a variety of realistic situations. Students often remark how watching other facilitators in subsequent rounds gives them ideas for what might have worked when they facilitated during the simulation as well as a model for how to (or not to, as is sometimes the case) deal with similar situations in future team settings. Learning occurs not only by doing but also by observing (e.g., Bandura, 1977). The complete simulation process, repetitive in format but dynamic in content and process, serves to continually challenge students and reinforce desired learning objectives.

The final key element of this simulation is the feedback process. Presumably, students have had previous instruction on how to give effective feedback (e.g., be descriptive, not evaluative; be specific, not general; focus on the behavior, not the person). If not, reviewing the principles of giving and receiving feedback would be important. The 4-minute feedback process within the 17-minute round is structured to provide helpful information to the facilitator without overloading or improperly criticizing him or her. At the completion of the first 8 minutes, the facilitator should begin by reflecting on his or her performance and describing what he or she thought he or she did well in the facilitation. This should be followed by the facilitator's honest

assessment of what he or she could have done better in his or her facilitation effort. Then, the group members should respond in a similar manner. If the instructor is available to facilitate the feedback session, he or she should encourage those giving feedback to provide specific examples of things the facilitator said or did to increase the usefulness of the feedback. After the feedback session, students continue with their meetings for an additional 4 minutes. This step enables student facilitators to utilize the feedback in the second part of the meeting to improve both their skills and confidence in facilitating teams and meetings.

Teaching Facilitation: Act II

Following the completion of the simulation exercise, some time should be spent discussing the challenges students experienced in their facilitating simulations. After a general discussion of the simulation, the instructor might ask a volunteer to share a particularly challenging or difficult moment that did not go as well as planned. The instructor uses this experience as a learning tool, probing students for ways to deal with the particular situation that proved too difficult during the simulation.

After about 15 minutes of discussion, the instructor will inform students that more experience observing and facilitating work groups is needed to improve facilitative skills. Highlighting the need for keen observation skills, the instructor asks students to refer back to the facilitation handouts while viewing[2] Sidney Lumet's 1957 film *Twelve Angry Men*, which is shown in class. The instructor might ask the students to take notes relative to jury members' role behaviors and the foreman's quasi-facilitative behaviors. The video is stopped periodically, and the instructor asks students questions such as the following:

- What types of behaviors do you see displayed at this point? (Some behaviors may be functional, such as clarifying the group's task or purpose, whereas others may be dysfunctional, such as stereotyping and causing divisiveness in the group.)
- What impacts might these behaviors have on the group's processes and outcomes?
- If you were asked to facilitate this group at this point in their task, what specifically would you do or say? (A complete list of questions is in Appendix F.)

Following the viewing and discussion of the video, the instructor may ask a summary question such as "Are you seeing things in this video that you

would not have seen a few weeks ago?" Students are often impressed with how much they have learned in such a short time. Other questions about the application of facilitation skills may be asked as appropriate.

Teaching Facilitation: Act III

A final element of teaching facilitation is the process of reflection on students' performances and the challenges faced when they facilitated. Reflective observation, according to Kolb (1984), is a critical element of comprehensive learning. To achieve this reflection, I typically assign a self-assessment assignment that contains the following questions:

1. What (interpersonal, managerial, organizational behavior) skills covered in our class did you find yourself using when you played the role of facilitator during this activity? Name at least two skills, and share an example for each.
2. When you facilitated, what do you believe to be the things you did particularly well? Please describe at least two instances when you felt your facilitation was effective.
3. When you facilitated, what do you believe to be the things you did not do particularly well or for which the outcome was different from what you had anticipated? Please describe at least two instances when you felt your facilitation could have been improved.
4. What lessons did you learn about yourself and about the challenges of doing work in teams from this activity? What steps can you take to improve your skills as a facilitator and as a team member?

This required self-assessment serves two purposes: First, it helps reinforce and complete the cycle of experiential learning; second, it serves as an assessment of student learning. When students complete the set of facilitation activities, they should understand the role of facilitation in teams; identify the skills and responsibilities of a facilitator; and by practicing and receiving feedback, increase their facilitative skills and identify areas for further development. Question 1 of the self-assessment addresses students' understanding of the skills necessary for effective facilitation, and through their recall of specific examples, students can reinforce earlier class concepts and applications. Questions 2 and 3 allow students to recall specific examples during their facilitation, likely aided by the feedback session, in which they did well (reinforces facilitation concepts and builds confidence) and needed to improve (reinforces facilitation concepts and addresses areas of weakness). Question 4 offers students an opportunity to reflect on the role and importance of facilitation on work teams as well as to identify steps needed to improve their skills as both team members and facilitators.

The process of reflection and self-assessment can be significantly aided through the use of videotape. If it is possible to videotape students' facilitation simulations, it would be best to require students to view their videotapes prior to completing the self-assessment exercise. Although I have not used this learning tool for this exercise because of resource constraints, it has been used for similar activities such as negotiation simulations. Students are typically very honest and reflective in their self-assessments without this tool; however, given the added recall ability and opportunity to observe students' actions and others reactions post hoc, it is clear that the use of videotape can offer additional and important benefits to the facilitation simulation. The ability to review and critique one's actual behaviors cannot be overemphasized.

Teaching Facilitation: Epilogue

Although the activity can and does improve students' facilitative skills, it should be clear that a facilitator cannot be "created" in several hours' time. At best, instructors should expect an increase in students' facilitative skills that can be applied to their current work groups. However, should students appear to possess sufficient facilitation skills, one could expand the classroom experience described in this article by assigning students the responsibility to observe and facilitate an ongoing work group, either in another class or back in their workplaces. (This assignment is available in Appendix G.) Students would preferably observe and share their observations at the conclusion of the first (or first few) meetings they observe. Then, as their skills and confidence levels increase, students may choose to actively facilitate and intervene in subsequent meetings. Students might then be asked to write up summaries of their experiences in facilitating "real" groups or teams.

Given the current reliance on teams and teamwork in the contemporary workplace, as well as the additional challenges presented by changes in the demographic makeup in the workforce, it is clear that facilitative skills are necessary and valued. However, some limitations on facilitation are important to note. First, it can be costly in terms of the facilitator's temporary full-time status on one or more teams. As such, not all work teams will have the luxury of adding (even temporarily) outside members to facilitate their activities. More likely, individual team members will be called on to use facilitative skills as appropriate. In this case, objectivity, one of the benefits perceptually bestowed on an "outside" facilitator, is not present. When such is the case, some of the problems inherent in culturally and functionally

diverse teams (e.g., misunderstanding or devaluing others' opinions, fighting over scarce resources) are not likely to be overcome by an "inside" facilitator.

Even when outside facilitators or process consultants are offered to a team, other problems may exist. First, teams can see the job of process facilitation resting squarely and solely on the facilitator. Such dependence precludes team development toward self-management. Second, at the other extreme, team members may not trust the outsider or "allow" him or her to intervene. This is especially likely when a team has existed for a period of time and resists the presence and questions the value of this appointed outsider.[3] Third, when management appoints a facilitator to a team without communicating the reasons or objectives for this step, team members might become suspicious and choose to be less forthcoming in team meetings and discussions. Facilitators can only facilitate what they see and hear; if the team's work goes "underground," there is not much a facilitator can do to help, should his or her help be needed. Fourth, facilitators may meet resistance because of a lack of familiarity and/or credibility with a part of the organization (Sisco, 1993), despite the fact that such unfamiliarity may underlie valuable objectivity. Because facilitators often work between teams and their management, a facilitator who is seen as ineffective or not credible (or a deterrent to some "master plan") might be "blocked" from helping a team achieve its goals by other organizational stakeholders. Organizational politics can and do pose a challenge for facilitators as well as other employees; some of these issues, despite effective facilitation, can be intractable.

Although team facilitation is not a panacea for all organizational challenges, undeniable benefits can be gained through the use of a trained process facilitator. Anecdotal evidence clearly supports this notion. More to the point of this article, facilitative skills can be learned and should be taught.[4] Some of the materials described herein were developed and implemented in a corporate context. Professional and supervisory employees were handpicked to participate in a facilitation training program. Participants and their managers took part in an orientation to the program designed to ensure that both were aware of and prepared for the challenges ahead. For the facilitator, these challenges centered primarily on his or her ability to provide facilitative support to ongoing work groups; for the manager, these challenges included their support of their employees' "reassignments" and assurance that their jobs would remain intact. The program (composed of 24-hour training, monthly support meetings, and one-on-one coaching if desired) was deemed a resounding success as measured by the ability of numerous ongoing and newly formed work groups to meet and exceed management's expectations.

Several elements were tweaked, and additional exercises were added when the facilitation simulation was adapted for classroom use. Students

who have gone through the facilitation "module" have reported far fewer "group problems" in their work groups than those who did not have the training. Follow-on assignments, such as the facilitation self-assessment and an overall class self-assessment, have revealed that students find the exercise particularly rewarding and instrumental in improving essential workplace skills. Although only one of at least two dozen exercises in a highly experiential interpersonal skills course, this exercise is singled out by as many as half the students as being the most valuable exercise for improving their interpersonal skills.

Appendix A
Role Behaviors

Behavior	Explanation	Example	Pros (cons)
Task related			
Initiating	Proposes a task	"Why don't we start by . . . "	Gets the "ball" rolling
Giving/seeking information	Offers/asks for facts, ideas	"In our department, we were able to cut costs by . . . "	Improves decision making
Clarifying and elaborating	Clears up confusion	"So you're saying . . . "	Ensures members understand one another
Summarizing	Restates, offers conclusion	"We've covered all but the last item on the agenda"	Can reduce time spent rehashing discussions
Consensus testing	Checks on group position	"It sounds like we agree on Points 1 and 2, but not 3 . . . "	Saves time, ensures decision buy-in
Maintenance related			
Harmonizing and compromising	Reduces tension, looks for middle ground	"It doesn't have to be either X or Y. Why don't we use the best elements of both?"	Reduces tension in group (can reduce risk taking)
Gatekeeping	Facilitates balanced participation	(To silent member) "What's your opinion?"	Ensures that members participate
Diagnosing	Shares observations of group process	"It seems a few of us are unhappy with the decision. Shall we revisit . . . ?"	Ensures that hidden problems are surfaced and dealt with

(continued)

Appendix A Continued

Behavior	Explanation	Example	Pros (cons)
Standard setting	Helps set norms, test limits	"Let's agree to brain-storm, then evaluate"	Facilitates team self-management
Dysfunctional			
Blocking	Prevents consensus	"I'm not going to agree to a solution that . . . "	Could slow down a hasty decision process (and bog down an effective process)
Dominating	Talks more than his or her share	The dominator often talks the longest and loudest, overshadowing others' potential contributions	(Can stifle others' participation)
Withdrawing	Silent, distracted	(Check body language)	Decision making may be quicker (if his or her concerns are not aired, he or she might sabotage the outcome later)
Self-seeking	Oppresses with personal needs	"The only way I'll agree to this is if you'll do . . . for me"	(Others might emulate this behavior and/or be biased against future inputs from him or her)

Appendix B
Problem People

Problem Person	Problem	Effect	Solution
The Silent One	Withdrawn. May be bored, indifferent, timid or insecure.	You lose a portion of the group's power. May have a negative effect on others in the group.	Ask for his or her opinions. Draw out the person sitting next to him or her, then ask the quiet one what he or she thinks of the view just expressed. If you are near him or her, ask his or her view so he or she will feel he or she is talking to you, not the whole group. Compliment the silent one when he or she does speak. Give positive verbal and nonverbal re-inforcement.
The Advice Seeker	Wants you to solve his or her problems or those of others. May try to put you on spot, trying to have you support one viewpoint.	Can put you in position of decision maker rather than the group.	Avoid solving other people's problems for them. Never take sides. Point out that your view is relatively unimportant compared with that of the group. Say, "Let me get some other opinions. Joe, what do you think of Sam's question?"
The Heckler	Combative individual who wants to play devil's advocate or may be normally good natured but is upset by personal or job problems.	Can trap you into a one-on-one fight. Can stimulate group infighting.	Stay calm. Don't lose your temper. Keep the group from getting excited. Try to find merit in one of his or her points, then move on. Toss his or her statements out to the group; let them handle it. Talk to him or her privately; try to find out what's bothering him or her. Appeal to him or her for cooperation.
The Fighters	Two or more people clash at the personality level.	Can divide the group into competitive factions.	Interrupt politely but firmly. Stress points of agreement, minimize points of disagreement. Ask direct questions on the topic. Request that personalities be set aside.

(continued)

Appendix B Continued

Problem Person	Problem	Effect	Solution
The Drifter	Talks about things not related to subject. Uses far-fetched examples. Gets lost.	Can cause confusion to self and the group.	1. Interrupt politely. Thank him or her. Refocus his or her attention by restating main points being discussed. 2. Smile. Indicate that you are having a problem relating his or her interesting comments to the subject at hand, or ask him or her directly to make this connection for the group.
The "Stand Pat"	Won't budge. Refuses to accept the group's decisions. Often prejudiced. Unable or unwilling to see your point or those of others.	Can turn group into competitive camps. Delays decision making.	Toss his or her view to the group: "Does anyone else feel as Pat does about this?" Tell him or her that time is short and ask him or her to accept the group's position for the moment. Offer to discuss the point with him or her later.
The Griper	Has some pet gripe. Has a legitimate complaint.	Can turn the meet-ing into a grievance session.	Point out, "We can't change policies, but we can do the best we can under the system." Indicate that you will bring the complaint (if legitimate) to the proper person's attention. Indicate time constraints. Offer to discuss the problem after the meeting or at a future point.
The Verbal Stumbler	Lacks ability to clearly express himself or herself. Has the ideas but finds it difficult to put into words.	Frustration, both to the person and to the group.	Help the person out. Rephrase his or her statements: "Let me see if I understand . . . (paraphrase his or her point)." Do not say, "What you mean is . . . " Keep the idea(s) intact and check for understanding.
The Sidetracker	No drifting, just off the subject or agenda.	Can cause confusion and waste group time.	Take the blame for sidetracking him or her: "Something I said must have led you off the subject. This is what we should be discussing: (restate point)."

Appendix B Continued

Problem Person	Problem	Effect	Solution
The Whisperer	Engages nearby people in side conversations while someone else has floor. May or may not be tangential.	Distracts you and other group members.	Do not embarrass him or her. Interrupt politely and ask if he or she could share information with the group. Ask his or her opinion of a remark (restate it for the person). Explain that you are having trouble hearing (or talking) when others are speaking at the same time.
The Eager Beaver	Overly talkative. Monopolizes the conversation. May be a show-off or just very well informed and anxious to show it.	Can shut out less aggressive members.	Do not be embarrassing or sarcastic. Interrupt politely with "That's an interesting point. What do the rest of you think about it?" (Look around group.) Might also use body language: Walk over to and stand behind the eager beaver and/or use your hands (like a traffic cop) to diminish his or her talking while encouraging others. Let the group take care of him or her as much as possible.
The Over-achiever	Although he or she is really trying to help, it makes it difficult to maintain control.	Shuts others out. May monopolize in genuine effort to be helpful.	Recognize the valuable traits of this person. Thank him or her. Suggest that "we put others to work . . . " Cut across tactfully by questioning others. Use this individual for summarizing.
The Mistaken	Member is obviously incorrect. Definitely in the wrong ballpark.	Can cause inaccurate information to spread. Causes confusion in the group.	Handle with care. Say, "I can see how you feel . . . " or "That's another way of looking at it . . . " To bring out correction tactfully, say "I see your point, but how can we reconcile that with (state correct point)?"

(continued)

Appendix B Continued

Problem Person	Problem	Effect	Solution
The Know-It-All	Can dominate group with comments such as "I have worked on this project for 10 years . . . " or "I have a Ph.D. in . . . and . . . "	May inhibit creativity, causing others to feel inadequate or that their opinions are not valued.	Avoid theory or speculation by focusing the group on a review of the facts. Might suggest another opinion such as "another noted authority on this subject, (state name), has said . . . "
The Late-comer	Comes late and interrupts meeting.	Slows down group's progress, particularly if latecomer insists on being brought up to speed.	Announce an odd time (e.g., 8:17 a.m.) for the meeting to emphasize the necessity for promptness. Make it difficult for latecomers to find seats, and stop talking until they do. Create a "latecomer's kitty" for refreshments.
The Early Leaver	Announces, with regret, that he or she must leave for another important activity.	Interrupts meeting flow and can halt progress if he or she is critical to an upcoming discussion that now must be deferred.	Before the meeting begins, announce and confirm the ending time, and ask if anyone has a scheduling conflict. If this is a standing conflict, ask group if they would like to change meeting times.

SOURCE: Adapted and compiled from de Janasz et al. (1992, pp. 13-4–13-10) and Peoples (1988, pp. 147-155).

Appendix C
Facilitative Interventions

General Approach	Specific Things You Can Say or Do
Boomerang	Don't get backed into answering questions the group should be answering for themselves. Boomerang the question back to the group. Group member: "Facilitator, which problem should we deal with first?" Facilitator: "That's up to the group. Which do you think we should discuss first?" Group member addressing the facilitator: "What was the inflation rate for last year?" Facilitator: "Who can answer that question?" Group member: "I don't like the direction we're taking here." Facilitator: "What do you think we should do?" (See "Don't be defensive" below.)

Appendix C Continued

General Approach	Specific Things You Can Say or Do
Maintain/regain focus	"Wait a second. Let's keep a common focus here." "Just a moment, one person at a time. Joe, you were first and then Don." "I can't facilitate if we have two conversations going at once. Pleased try to stay focused." "Excuse me, Elizabeth. Are you addressing the issue of . . . ?" "Let's work on one thing at a time."
Play dumb	When the group has gotten off track, or the meeting has broken down in some way, playing dumb is a way of getting the group to focus on its own process by having to explain it to you. It's a form of boomeranging and is easy to do when you're really confused. "Can someone tell me what's going on now?" "I'm confused. What are we doing now?" "Where are we?" "I'm lost. I thought we were . . . "
Say what's going on	Sometimes, simply identifying and describing a destructive behavior to the group is enough to change that behavior. Be sure to "check for agreement" after your process observation. "You are not letting John finish his presentation." "I think you're trying to force a decision before you're ready." "It seems to me that . . . " "My sense is . . . "
Check for agreement	Almost any time you make a statement or propose a process, give the group an opportunity to respond. Don't assume they are with you. "Do you agree?" "All right?" "OK?" A powerful way of checking is to look for the negative. Make silence a sign of confirmation. Rather than saying, "Do you all agree?", ask any of the following: "Are there any objections?" "If there are no objections (pause), we'll move on to . . . " "Is there anyone who can't live with that decision?"
Avoid process battles	Don't let the group become locked into arguments about which is the "right" way to proceed. Point out that you can try a number of things, deal with more than one issue. The issue is which one to try first. (See "Preventions" below. Educate the group.) "We can try both approaches. Which one do you want to try first?" "Can we agree to cover both issues in the remaining time? OK, which do you want to start with?"
Enforce process agreements	Once the group has agreed to a procedure, your credibility and neutrality may be at stake if you don't enforce their agreement. "Wait a second, you agreed to brainstorm. Don't evaluate ideas . . . " "Harry, let John finish." "Sorry, Beth, I'm afraid your time is up."
Encourage	"Could you say more about that?" "Why don't you try?" "Keep going. I think this is useful."
Accept, legitimize, deal with, or defer	This is a general method of intervening that works well for dealing with problem people and emotional outbreaks of all kinds. "You're not convinced we're getting anywhere? That's OK, maybe you're right." "Are you willing to hang on for 10 more minutes and see what happens?"

Appendix C Continued

General Approach	Specific Things You Can Say or Do
Don't be defensive	If you are challenged, don't argue or become defensive. Accept the criticism, thank the individual for the comment, and boomerang the issue back to the individual or group."I cut you off? You weren't finished? I'm sorry. Please continue." "You think I'm pushing too hard? (Lots of nods.) Thank you for telling me. How should we proceed from here?"
Use your body language	Many of these interventions and preventions can be reinforced, and sometimes even made, by the movement of your body or hands, for example: Regaining focus by standing up and moving into the middle of the group. Enforcing a process agreement by holding up your hand to keep someone from interrupting. Encouraging someone by gesturing with your hands. Stopping a monopolizer's talking by walking over to him or her and standing next to or behind him or her.
Use justifying questions	When team members disagree on an issue, a facilitator can use justifying questions to help bring out discussions by uncovering facts and reasons behind team members' opinions. Group member: "Well, we tried it before, and it didn't work then." Facilitator: "What could you share about that experience . . . lessons learned . . . so we don't make the same mistake twice?"
Use leading questions	Use when the team has too narrow a focus, and you want to gently guide them into another direction or if the team needs a "jump start." "Have you ever thought about using . . . ?" "Are you sure that is your only option?" "What precludes you from trying . . . ?"
Use the group memory	The group memory (i.e., the easel or notepad on which minutes or key points are being recorded) can also be used to reinforce many of the interventions and preventions. For example: Walking up to the group memory can facilitate regaining focus by pointing to the agenda item the group should be dealing with. Getting agreement on content can be greatly supported by writing down or circling the subject to be discussed.
Don't talk too much	The better a facilitator you become, the fewer words you will have to use. When you have really done a good job, the group may leave thinking that the meeting went so well it could do without you next time. Use your hands, eye contact, and partial sentences to communicate economically. Examples include: "I'm sorry. You were saying that . . . " "Could you say that again?" "The point you were making was . . . "
Use hypothetical questions	When a team appears to be stagnant or more interested in maintaining the status quo, the facilitator could use hypothetical questions to spur creativity, innovation, and so forth. Group member: "I can't come up with any more ideas for change. We've already improved as much as we can." Facilitator: "What if money were no object?" or "If you change any one thing about your work or environment . . . "

Appendix C Continued

General Approach	Specific Things You Can Say or Do
Use a reality check	Use when a team needs to reexamine and/or modify its direction, progress, process agreements. "Time out for a reality check: Are we doing what we said we would do? Or should we be discussing this now? Or do we need to change our milestone chart? Or is this something we should talk to our sponsor about?"
Use the "round robin" method	If a team member is monopolizing the conversations while others are nearly silent, you might suggest, "Why don't we go once around the table? What do you think might be a way to improve . . . ?" Call on members in a clockwise direction, ensuring that no member is skipped and the direction is maintained.
"Talk to your neighbor"	Sometimes you'll ask a question and get no response. No one understands it, no one cares about it, or no one has had enough coffee. Rephrase the question, and ask team members to discuss their responses with the people sitting next to them. A lively discussion is sure to ensue.
Use a time-out	When team members are fighting, losing sight of the big picture, or are uncooperative for some reason, try calling time out. Ask that members take a 5-minute break, after which the meeting will resume.
Trust the process	A novice facilitator panics easily. When an intervention doesn't appear to work, he or she may conclude that the sky is falling and rush in with an alternative intervention, only to get caught in a vicious circle. Instead, practice patience and trust the process (and the team!). Presume that the situation is "still cooking," and wait until things fall in place and the activity flows smoothly. Sooner or later, the good things will swamp the bad things.
Call a team member's bluff	Use when a team member threatens to do something unless or until the team changes direction. (This intervention is risky; you must be willing to accept a team member's decision.) Team member: "Well, since my opinion isn't valued, I guess I'll leave." Facilitator: "I'm not asking you to leave. You can do what you want. You'll have to live with that decision."

SOURCE: Adapted and expanded from de Janasz et al. (1992, pp. 6-42–6-46).

Appendix D
Meetings

Round 1

Parking at (name of university) has always been something of an issue for students. What suggestions does your team have for improving this situation—to be

implemented in the short term (within the next year) and in the long term (within 1 and 3 years from today)? Mrs. Jones, manager of parking, would like your team's output by the end of next semester.

Round 2

Your team has been assembled by the dean for academic programs to come up with recommendations for improving the College of Business undergraduate curriculum. Dean Smith would like your recommendations by the beginning of next semester.

Round 3

Your team has been assembled by the director of residential life to enhance the quality of the undergraduate residential experience at (name of university). Ms. Brown expects your team's report and recommendations within 3 months.

Round 4

Your team—an ethnically diverse group of male and female employees who range in age from 21 to 59, most high school graduates but some with 2 years of college— has been assembled by the vice president of operations of a large, Fortune 500 company that has just embraced "teaming." Customer complaints about your products and services have risen over the past few years, and it is the vice president of operations's hope that teaming can turn that trend around. Your team's task is to come up with recommendations for how to implement teaming in the customer service division, one of 10 divisions in this company.

Round 5

The College of Business is considering requiring all incoming freshmen to purchase laptop computers. Other schools (e.g., the University of Virginia, Wake Forest University) have such requirements. Students can "plug in" to their classrooms and are able to instantly access the Internet, professors' lecture notes, and so forth. Recruiters also have a stake in seeing this implemented because it nearly guarantees the computing competency of all graduates. Dean Smith wants your team, representing various business majors and years in school, to evaluate the viability of implementing this requirement within 3 months and to develop strategies for implementing your recommendations no later than 6 months from today.

Round 6
(or an extra round as necessary)

Your team has been assembled by Dr. White, president of (name of university), to recommend how to improve both the quality and diversity of students who apply to (name of university). What strategies would you suggest and why? Dr. White expects your team's recommendations within 6 months.

Round 7
(or an extra round as necessary)

In the high-tech firm for which you work, three separate strategic business units (SBUs) manufacture a "black box" that is a subassembly for a larger electronic device. These operations were separated in the past because of government regulations. Recently, the regulations were lifted, and the president of your firm mandated that the production of the black box be centralized in an effort to streamline operations and reduce operating costs. Your team—employees representing the three SBUs and their various functional areas (e.g., electrical engineering, manufacturing operations, mechanical engineering)—is expected to present its plan for centralizing production of the black box by the end of the next quarter.

Appendix E
Role Cards to Be Used in the Facilitation Simulation

Be yourself

Be a **gatekeeper**: Help the facilitator ensure that participation is balanced (i.e., all members contribute)

Be a **whisperer**: Periodically engage nearby people in side conversations

Be an **advice seeker**: Solicit input and advice from the facilitator to help your team make decisions

Be a **sidetracker**: Discuss items not on the agenda

Be **silent**: Don't speak unless spoken to

Be an **interrupter**: Start talking before others are finished

Be a **talker/monopolizer**: Always have something to say

Be an "**expert**": Offer advice on any and all subjects

Be a **fighter**: Pick a "fight" and/or argue with another team member

Be a **complainer**: Tell everyone why what they're working on will never work

Appendix F
Potential Questions to Ask Concerning *Twelve Angry Men*

1. In the beginning of this clip, we see the foreman suggesting a process (i.e., "Why don't we take a straw vote?") and clarifying instructions related to this process. Using Schein's (1988) role behaviors as a guide, which behaviors did the foreman use and what effect did they have?
2. During this initial or straw vote, we see hesitation on the part of some members when casting their votes. What explains this hesitation, in your opinion, and if you were the foreperson, what might you have done differently?
3. After this vote, some members can be seen pressuring the single dissenting member. If this were to happen in a team you were facilitating, what intervention would you use and why?

4. Midway through the clip, the foreman suggests one process ("Let's all go around the table and convince this man why he's wrong"), and immediately thereafter, another jury member suggests a different process ("It seems to me that he—the dissenter—should be the one who tries to convince us"). Both processes have value. How would you help the group choose between the processes? What, specifically, would you say or do?

5. Periodically, throughout the clip, we see jury members treat one another harshly (e.g., remarks that are ethnically and/or age discriminatory). If you were to facilitate this group, would you intervene during these moments? Why or why not? If you would intervene, what would you say or do and why?

6. The foreman is actually one of the 12 jury members. At times, he plays a leader-like role; other times, he is facilitative. Cite examples of each. Should he play both leader and facilitator? Why or why not?

7. Different jury members have different personality styles. Such is also the case on most teams. What are some ways to point out these differences in a way that enables members to benefit from instead of being aggravated by these differences?

8. The jury member (played by Jack Klugman) who admits that he "grew up in a slum" and identifies with the defendant speaks infrequently and only when requested by others to do so. Even then, he seems to lack confidence in sharing his ideas and concerns. If you were to facilitate this "team," what techniques might use to help this character contribute? Identify at least two interventions, and describe how you would use them.

9. Another jury member (played by E. G. Marshall) is intelligent, articulate, and very confident in his opinions. You could see this when he tries to point out the defendant's guilt on the basis of the boy's inability to recall the name of the movie(s) he saw. These qualities can both benefit and hinder a team's process. What impact did his behavior have on you? If you were to facilitate the meeting, what might you have said or done to facilitate this member and why?

10. Which of the four stages of teaming did this "team" go through? Identify the stages, and cite evidence to support your answer.

Appendix G
Meeting Observation Assignment

A critical step to developing facilitative skills is knowing when and why to intervene. Knowing when takes practice, and one way to get this practice is to start by observing other teams and meetings in process. To do this assignment, you will need to observe a team or work group meeting from start to finish. It is preferred that you are not a member of this particular team or work group because it would be difficult to pay careful attention to the process while being expected to actively participate in the meeting. Answer the following questions completely yet concisely.

1. From what you observed, how clear are the goals for the team in general and for this meeting in particular? What evidence is there that members clearly understand what they're supposed to do? Explain.

2. Did the meeting start on time? End on time? Did people arrive late or leave early? What impact, if any, did this have on the meeting process?
3. Did the team use an agenda for the meeting? If yes, in what ways did it facilitate or hinder the meeting's goals? If not, in what ways would an agenda have been helpful? Explain.
4. Did team members play defined roles for the meeting, such as timekeeper, scribe, facilitator, and leader? Were these roles explicitly or implicitly determined?
5. What could you discern from communication patterns? Were there one or two members who monopolized the conversation, and what impact did that have on the meeting process? Were there any individuals who were mostly quiet (i.e., only speaking when spoken to)? Were there any side conversations or overtalking (people talking simultaneously)? If so, did anyone attempt to stop this? If not, what impact did this have on the process?
6. Were any decisions made during this particular meeting? How was the decision made? What process was followed (e.g., the leader made a suggestion and a debate ensued), and what decision rule (e.g., majority, consensus) was used? Did members appear to be satisfied with the outcome of the decision? Why or why not?
7. Did any of the members use facilitative behaviors in the meeting? Cite an example.
8. Were there any occasions in which you would like to have intervened? Describe the situation, what you would have done or said, and what you expect the outcome would have been had you been the facilitator.

Appendix H
Chronological Listing of Suggested
Activities for Teaching Facilitation

Activity	Suggested Time Allotment
Lecture and discussion: The need for facilitation, what facilitators do, why, what skills they need, what experiences students may have had that required facilitation.	About 30 minutes.
Discussion of facilitation techniques and interventions. In a previous session, each student is assigned a particular intervention and is instructed to prepare a short, 2- to 3-minute presentation on the intervention, including how and why it is used and what it might look and sound like. In small groups, students present their interventions. Then, each small group selects, prepares, and presents an intervention (usually in a short skit) to the class.	Between 30 and 60 minutes, depending on size of class and number of students and whether students' preparation is done outside of class.

(continued)

Appendix H Continued

Activity	Suggested Time Allotment
Five to six volunteers are selected to simulate a facilitated meeting in front of the class, using the format (meet, debrief, continue meeting, debrief) of the actual facilitation simulation. Extend debriefing, as appropriate, discussing students' and instructor's observations. Repeat if desired; a second session might also be done using an experienced facilitator.	A minimum of 20 to 30 minutes for one "preview" simulation; allow more time if a subsequent session is completed.
Facilitation simulation: Following a brief reiteration of instructions, students are moved to breakout rooms. Each round (including meeting and feedback) could take between 15 and 30 minutes, depending on number of students, time available, and so forth. As many facilitation simulation rounds will be held as the number of students in each group. These can occur in a single extended session or several shorter sessions.	Depending on number of students in each group (i.e., rounds) and the length of each round, the simulation could take between 75 and 150 minutes.
Students view *Twelve Angry Men* in its entirety (if time permits) or selected parts (see note 2). The instructor might facilitate a discussion using such questions as those discussed in "Teaching Facilitation: Act II" or contained in Appendix F.	A minimum of 2 hours if the video is shown in its entirety and followed by class discussion.
Assign the self-assessment reflection exercise (see "Teaching Facilitation: Act III") and, if appropriate, the meeting observation exercise (see Appendix G). Instructor might debrief assignments in a subsequent class session.	Varies depending on time available and exercises assigned.

Notes

1. A list of meetings is contained in Appendix D. Some of these are more student oriented, whereas others are intended to mimic the workplace. Notice that several of the latter variety include elements of demographic and functional diversity to increase the realism of the situation.

2. The entire video (approximately 90 minutes) should be shown. However, if time is at a premium, much of the educational effect of the video can be retained by viewing the first 20 minutes of the video and then fast forwarding to the segments depicting the jury members' discussions immediately preceding and following their voting processes.

3. Such "entry barriers" exist and can be addressed following the simulation. The instructor might ask students what these might look like and how to address them. A facilitator could introduce himself or herself at the first meeting and discuss with the group how he or she sees his or her role. This role can then be negotiated over time. For example,

Hi, I'm Jan Smith. Your manager asked me to come to help you map your manufacturing process to find ways to decrease defects and cycle time. My background is in (indicate background), and I see myself doing (list roles and/or responsibilities) for you. What

concerns do you have about me or my role? What can you tell me so far about what has been effective or ineffective since your team began its work?

4. A chronological listing of suggested activities and time allotments for teaching facilitation appears in Appendix H.

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