LEMONS

to

Lemonade

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Resolving Problems in Meetings, Workshops, and PLCs

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ABOUT THE AUTHORS

ROBERT J. GARMSTON, EdD, is an Emeritus Professor of Educational Administration at California State University, Sacramento, and Founder of Facilitation Associates located in Sacramento, California, and Cofounder of The Center for Cognitive Coaching and the Center for Adaptive Schools (www.thinking collaborative), both located in Denver, Colorado. Formerly a classroom teacher, principal, director of instruction, and acting superintendent, he works as an educational consultant specializing in leadership, learning, and personal and organizational development. He has made presentations and conducted workshops for teachers, administrators, and staff developers throughout the United States as well as in Canada, Africa, Asia, Australia, Europe, and the Middle East.

Bob has practiced meeting management in each of his leadership roles, and for thirty years, he has taught facilitation skills, presentation skills, and group management to educational leaders. He taught meeting management in Copenhagen to supervisors in the World Health Organization. He studied under Michael Doyle and David Strauss, cofounders of the Interaction Method of Conducting Meetings. In the 1980s, he formed a group in Northern California to study and refine facilitation techniques. For four years, he wrote

a column on managing meetings from the perspectives of presenters and facilitators for the *Journal of Staff Development,* a publication of the National Staff Development Council, now Learning Forward.

Bob has written and coauthored a number of books including *Cognitive Coaching: A Foundation for Renaissance Schools, How to Make Presentations That Teach and Transform, The Adaptive School: A Sourcebook for Collaborative Groups, A Presenter's Fieldbook: A Practical Guide, Unlocking Group Potential for School Improvement,* and a memoir, *I Don't Do That Anymore: A Memoir of Awakening and Resilience.* He has been recognized by NSDC for his contributions to staff development. His work has been translated into Arabic, Hebrew, Italian, and Spanish.

In addition to educational clients, he has worked with diverse groups including police officers, probation officers, court and justice systems, utilities districts, the United States Air Force, and the World Health Organization.

DIANE P. ZIMMERMAN, PhD, is a writer and consultant focusing on entrepreneurial learning and schools that make a difference. She obtained her PhD in Human and Organizational Development from the Fielding Graduate Institute. She recently retired as a superintendent of schools after a 36-year career in education that was rich in leadership, facilitation, and conflict management.

Trained originally as a speech therapist, Diane worked early in her career as a teacher, speech therapist, program manager, and assistant director of special education in Fairfield, California. She subsequently became a principal in Davis, California, and

served consecutively in two schools more than 13 years before being promoted to assistant superintendent for personnel. In 2002, she began a nine-year journey as a superintendent of Old Adobe School Union School District, a small suburban elementary school district in Petaluma, California. She prides herself in moving the district's teachers from contentious union interactions to cooperative collaborations as productive, interest-based educators who collectively set the highest standards possible for their school district.

Diane has been active in professional development all of her career. While obtaining her administrative credential, Diane was assigned to Bob Garmston as her intern coach. This early career interaction turned in to a lifelong intellectual partnership, and Diane became an influential leader in the Cognitive Coaching consulting consortium founded by Bob Garmston and Art Costa.

Diane has taught in administrative training programs at several northern California universities, and over the past 20 years she has written and consulted in the areas of Cognitive Coaching, teacher supervision and evaluation, facilitation, stages of adult development, assessment of leadership skills, and constructivist leadership.

Leadership and mediation of conflict has always been a part of Diane's life. She was encouraged to assume leadership roles throughout her career, from early work supervising in a family restaurant business, to her first teaching job in a new special education program, through her years as a principal. Throughout her career, she has been involved in handling divergent opinions and mediating conflict. She gained a substantive reputation as the in-house expert in facilitation, and her staff valued her ability to create learning communities long before professional learning communities were popularized.

INTRODUCTION

The purpose of this book is to extend the reader's practical knowledge of successful ways to anticipate and correct the many events that can go wrong in professional gatherings—meetings, professional development sessions, PLC deliberations, and the like. Teacher leaders, mentors, site administrators, curriculum coordinators, staff developers, and district administrators will find the ideas here useful. While written with educators in mind, the principles and ideas are fully applicable in business, community organizations, and the military. We have worked in each of these sectors.

Leaders of work groups and presenters will find the tools in this book useful to help them manage learning environments, and those who lead meetings in which the purpose is to plan, explore ideas, assess programs, or make decisions will use these ideas consistently. While our focus is on disruptive events—what goes wrong in sessions—our mission is to create teamwork that fosters success—to create lemonade. To be specific, success means getting work done efficiently, honestly, and with great integrity.

As our work world becomes more complex, social networks denser, and the need for collaboration greater, meetings have become commonplace. Anytime more than three people come together to get something done we think of it as a meeting, and

we believe that this collaborative work deserves purposeful attention. We advocate that all participants share a responsibility for the effectiveness of these gatherings. Successful meetings do not happen by accident. There are three common complaints about meetings: (1) They waste our time, (2) we never get to real issues either because participants often do not speak up or one person dominates, and (3) disagreements and conflict render the sessions not only unproductive but unsafe. This book is a practical tool kit for the facilitator who wishes to address these issues, and more than this, any member of a group can make a difference by practicing skills in this book. Our vision of effective meetings is that everyone is a facilitator. In fact, many of the communication strategies are effective across all the human domains of interaction in which we could benefit by being open, honest, and tactful. We believe that responsibility for successful meetings should be part of the expected work ethic—meetings are serious business and everyone is responsible for making them effective. The techniques outlined in this book are organized from novice to expert, providing interventions for all kinds of meeting snafus. While this is essentially a how-to book, we want to stress the importance of personal wisdom—your own experiences and reflections. We will use the term *facilitator* to describe the function of managing a meeting, no matter what name you might give to this role in your organization. Over time, accomplished facilitators learn just when to intervene with counterproductive participants and events and develop finely tuned intervention radar to know how to turn problems into learning opportunities. Like turning lemons into lemonade, the accomplished facilitator takes what is and improvises to create what existed before only in the realm of possible.

TO INTERCEDE IS TO LEAD

To intervene means to take action to change what is happening or might happen to prevent counterproductive behaviors and increase group productivity and learning. When we intercede, we intervene on behalf of another—in this case on behalf of the group. The facilitator must always ask, "Is this intervention in the best interest of the group?" However, we are also interceding on behalf of individuals in that our interventions need to tactfully guide and direct unproductive behavior to more productive channels. When this is done skillfully, all save face and feel safe. For example, when a group member begins to dominate the meeting, a facilitator might give the direction, "Turn to your neighbor and talk about what other ideas would be important for the group to consider. Be prepared to share." Or a facilitator might say, "Let's hear from someone who hasn't talked yet," and wait until other hands go up. Or a facilitator might say, "I notice that one person is doing most of the talking. Earlier you agreed to balance participation. Take a moment and talk with your neighbor about why you think this is happening. Be prepared to share."

This book encourages readers to participate vicariously. For each intervention strategy we included, we asked ourselves, "Have we done this?" or "Would we perform this particular intervention?" Readers are invited to stand on our shoulders and on the shoulders of those we have learned from to accelerate their successes and, we hope, shorten the trial-and-error part of the learning sequence. There are no right answers in facilitation but only approaches to challenges, and so there can be no guarantees; however, this book offers multiple solutions to help facilitators increase their intervention repertoires and chances for success.

We intend to serve both those who are seeking to improve their facilitation skills and those skilled facilitators who want to extend their knowledge base about intervening when things go wrong. Probably no single facilitator has used all of the intervention strategies described in this book, so at whatever level the reader is, we anticipate there will opportunities to add to one's repertoire.

WHY READ THIS BOOK

"Meetings are as common as dirt and about as popular."

(Weisbord & Janoff, 2007, p. ix)

A major source of the low status of meetings, and sometimes other public gatherings like in-service sessions, comes from disruptions that are not effectively addressed. George Kieffer (1988), in his book *The Strategy of Meetings,* says that meetings are essentially mobs in waiting. They are easily susceptible to passions and manipulations. Time is wasted, goodwill is lost, and environments that should be productive sometimes become unsafe. This book is about managing those unexpected occurrences that crop up when groups of people work together, and using these events to build group cohesion, productivity, and learning. The facilitator's most important job is to develop the group's resources while learning the craft of facilitating and adding intervention strategies. Interventions take on added power when facilitators learn to use strategies in ways to help groups work smarter. In short, this book is about how powerful interventions from a skilled leader

can cement a group's commitment to improved work that produces better results.

Groups are harder to manage than individuals. Many minds mean many perspectives, and in the worst of cases, groups will exhibit dysfunctional tendencies like the law of triviality and avoidance, spending maximum time on matters of least importance—putting disproportionate weight on trivial issues. Ironically, when topics are safe, everyone has an opinion and groups tend to speak up, becoming verbose. However, when a nontrivial issue comes up, the group may become silent. So simply forming a group does not mean that members are skilled in functioning together. Groups are complex, nuanced entities requiring skilled leadership and collective knowledge of how best to work. From PLCs, to departments, to staff meetings, to advisory groups, forming a group is but a first step toward collective goals. Often in these settings problems arise from well intentioned but unskilled people. *From Lemons to Lemonade* will aid in resurrecting the positive energy and goodwill that should pervade group settings. Readers will be able to anticipate and prevent problems before they occur and gain confidence in addressing those that still sneak in the door. Time will be used more effectively. Greater senses of positivity will prevail. Groups will gain faith in their power to make a difference in their work.

Like *Unlocking Group Potential to Improve Schools* (Garmston with von Frank, 2012), this is a field guide inspired by more than 40 years of working with groups. While working on *Unlocking Group Potential,* Bob talked with leaders about common problems they encountered with groups. Out of that and our own experiences grew the exhaustive list of issues contained in this book.

In addition, accomplished facilitators learn that while they are in charge of process, they also are serving the group—and must

trust the group's wisdom about itself. When any of the strategies in this book are used primarily to control a decision or to drive content in a particular direction, groups will sense the difference and distrust the process and the facilitator. Accomplished facilitators are sensitive to their personal beliefs as well as the group's needs. Chapter 2 describes how to take care of yourself first and then take care of others.

The book is organized into three introductory chapters and four how-to chapters.

To build a repertoire of interventions, read cover-to-cover. Some readers, however, may want to go directly to one section to learn a few intervention strategies, and so the problem locator in Figure I.1 may help to identify chapters relevant to specific situations.

Time, experience, strategies, mental rehearsal, and reflection contribute to the facilitator's ability to develop critical premises about intervening. A skilled facilitator knows the relationship is with the group, not the individual. That understanding helps those leading groups to have the backbone to assertively intervene without sacrificing the group to keep one member happy.

As you take time to understand and learn more about the art of direct intervention, you will be able to see how treating each group member with dignity and respect enables interventions to succeed. The latter four chapters are organized for increasingly direct interventions that may, in some cases, even be uncomfortably assertive.

The learning of all complex behaviors requires time, patience, practice, and reflection. Stay the journey—and celebrate each success.

Figure I.1   Problem Locater

Challenges	Location	Strategies
Facilitator is attacked	Chapters 1 and 7	The six-step response
Insufficient confidence	Chapters 1 and 2	Mental rehearsal, centering, identity as a facilitator, room arrangement, and evaluating self and group on a proficiency scale
Managing personal emotions	Chapter 2	Overcoming discomfort, nervousness, becoming centered, staying true to who you are in response to stressors and circle of excellence
Overcoming judgmental responses	Chapter 2	Presume positive intentions
Creating an adequate environment	Chapter 2 and Appendix	Address environmental details that distract group members: room arrangement, seating, temperature, and noise pollution
Intervening with consistency, clarity, and safety	Chapter 3	Respond with compassion, use precise language, and determine risk levels
Deciding when and how to intervene	Chapter 4	Assure standards and working agreements, evaluate working agreements, recalibrate, clarify tasks, manage group energies and emotions, and keep work relevant

(Continued)

Figure I.1 (Continued)

Challenges	Location	Strategies
Getting attention and focus, managing workflow breakdowns, emotional outbursts, and power struggles	Chapter 5	Attention first, signals, proximity, refocusing moves, redirecting engagement, energizing a quiet group, and managing emotions from positions to interests
Managing low engagement and problem behaviors	Chapter 6	Ignoring the knitter, intervening with the nonparticipant, daydreamer, silent person, frowner, and distracted participant
Managing disruptive participants	Chapter 6	Interventions for the broken record, long-winded speaker, humorist, inappropriate humorist, late comer, early leaver, resister, side talker, know-it-all, monopolizer, rhetorician, overly articulate, pedagogical isolate, misinformant, interrupter, subject changer, and texter
Managing complex situations	Chapter 7	
Group conflict		Grounding and existing-desired state
Demoralizing external events		Desired state, third point, redirecting resistance, pace and lead, and structured interviews
Disputes		Verbalize the issue, acknowledge each position, identify source of information, check perceptions, and reframe conflict as asset

Challenges	Location	Strategies
Dissenting views		Paraphrasing partner, pace the emotion, redirect attacks, reframe the opposition, use styles, assumptions wall, brainstorm questions, and disperse to agree
Personal attacks		The six-step response, step between opposing members, change the narrative, and enlist the group in solving the problem
Challenges to the leader		Process commercial, engage with more intensity, engage with less intensity, and request civility
Subgroup manipulation		Decision matrix, values decision matrix, require a quorum, pace-lead-poll, one-minute advocacy, and alternate microphone advocacy
Sabotage		Surface tensions, cynic as frustrated optimist, pair up and explore sabotage, and elephant walk
Irresolvable conflicts		Polarity management