

4-1-2006

Fa·cil·i·ta·tion: The Road to Effective Meetings

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Recommended Citation

Rilla, E., Paterson, C., Manton, L., & Day, P. (2006). Fa·cil·i·ta·tion: The Road to Effective Meetings. *The Journal of Extension*, 44(2), Article 29. <https://tigerprints.clemson.edu/joe/vol44/iss2/29>

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April 2006 // Volume 44 // Number 2 // Tools of the Trade // 2TOT5

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Facilitation: The Road to Effective Meetings

Abstract

Feeling frustrated with meetings that take a lot of time yet accomplish little? In California, a "team" of trained Extension professionals conducted Essential Facilitation (EF) workshops to expand this technique among 200 Extension professionals, faculty, and volunteers throughout California. Visit our Web site at <http://groups.ucanr.org/ANR_Leadership/> to read five case stories illustrating a wide range of scenarios where EF strategies make a difference in meeting effectiveness and how they benefit community efforts. Learn how the Interaction Associates model of meeting facilitation is rapidly becoming the method of choice for more productive and satisfying meetings with University of California Cooperative Extension staff.

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Introduction

Feeling frustrated with meetings that take a lot of time yet accomplish little? Do you notice how most of the talking comes from only a few meeting participants? Whether you call a meeting to analyze a problem, develop a plan, report on progress, celebrate an event, or simply to socialize with friends or family, you want the meeting to be efficient and rich with input from all participants. Almost everyone can learn and use facilitative behaviors to guide the meeting process and to support the group in accomplishing desired outcomes (Schwartz, 1994). In California, a "team" of trained Extension professionals conducted Essential Facilitation workshops to expand this technique among 200 Extension professionals, faculty, and volunteers throughout California.

Why Bother?

After the University of California Cooperative Extension (UCCE) reorganized in 1999, senior administrators, divisional, and regional directors saw the need for embracing a method to conduct meetings that were more focused and effective. Familiar with the Interaction Associates program <<http://www.interactionassociates.com/>> of learning and performance improvement, their goal was to train employees, no matter their work title, in the art and science of Essential Facilitation (EF) as developed by Michael Doyle and David Straus (1976).

Train the Trainer Program

UCCE contracted with Interaction Associates (IA) to train a team of 10 in-house employees to become EF trainers. Each team member completed two 5-day workshops. Subsequently, each team member conducted a 3-day Essential Facilitation practicum, which was observed and critiqued by an Interaction Associates trainer. All 10 team members successfully completed the training and were certified by IA as Essential Facilitation trainers.

The "team of 10," in turn, trained UCCE employees in the EF technique, so that employees might apply their newly acquired EF tools to their professional work. After the training, graduates were to be able to:

- Plan and conduct effective meetings,
- Guide groups toward their objectives,
- Assist meeting participants in building understanding and agreement,
- Bring out the best in each group member, and
- Demonstrate the power of facilitation at work, at home and in the community.

A maximum of 14 trainees per workshop participated in interactive sessions, with plenty of one-on-one contact with trainers. Each participant completed a pre- and post-quiz, conducted a facilitated meeting where they were videotaped and critiqued by the trainer, and if successful, graduated as a certified facilitator. Using these new tools in their daily work, the graduates are now part of a statewide team of county based advisors, 4H and Master Gardener volunteers, specialists, administrators, and support staff who use this proven meeting technology to conduct focused, effective meetings.

Fa-cil-i-ta-tion: The Art of Making Easy or Easier

Over 200 ANR members have been trained during the past 6 years in EF techniques. They are using this model in their programs, in staff meetings, in community forums, and in professional conference settings.

A random sample of 52 EF graduates administered in January 2003 shows that:

- 97% of them find EF techniques useful on the job, 80% use EF with other groups, and 71% use EF at home with family and friends;
- 16% use EF skills daily, 48% use EF weekly, and 29% monthly; and
- EF methods were used in:
 - Industry meetings to define problems and possible solutions,
 - Implementation meetings of research teams,
 - Program volunteer meetings,
 - Day-to-day supervision of staff,
 - Committee meetings,
 - Long-range planning,
 - Activity planning with friends, and
 - Communication and decision-making among family members.

All of the respondents say they plan to continue using EF skills. Says Sharon Asher, 4-H Staff Assistant, "I really enjoyed the training. It's the first one in a long time that I feel has truly been worth spending the time and energy on, and I left with many tools that will benefit me."

Community Impacts

Twenty percent of all UCCE employees received EF training, meaning that those 200 individuals have, as extenders of the methodology, reached an estimated 12,818 individuals. UCCE partnerships with campus departments, e.g., Human and Community Development, the School of Veterinary Medicine, and the Plant Science Department, have strengthened since faculty have taken the course and seen positive effects.

Says UC Davis Vet School associate dean of Extension & Public Programs, Don Klingborg, "Students and faculty were all reminded about the critical nature of effective process in delivering quality decisions about content issues, and were provided with key knowledge and skills for their individual 'tool box' to make them more effective."

The EF model rekindled partnerships with a clientele base, especially adult volunteers in the 4-H Youth Development and Master Gardener programs. Farm Advisor Pam Geisel explains, "Not only did facilitation help me manage meetings better, it actually helped me manage my volunteer program better. Facilitation is about helping others get the job done, including volunteers."

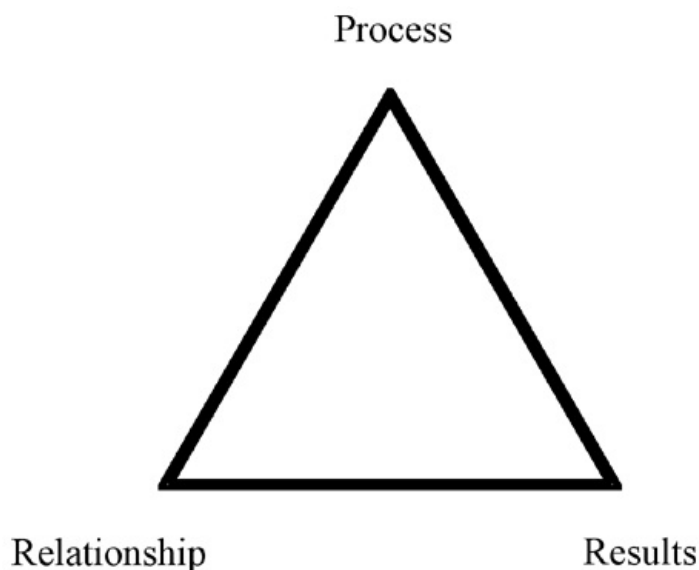
Dimensions of Success

One EF tool described in Figure 1 measures the impact of the Essential Facilitation methodology. A balance of the three components enables any working group to conduct an effective meeting or successful program. The dimensions include:

- **Process** (is transparent, meets the desired outcomes, provides a safe environment for all present, guides rather than leads the group),

- **Relationships** (individual's experience in relating to colleagues and the organization, how people feel about their contributions, group maintenance), and
- **Results** (accomplishment of the task, achievement of the desired outcome).

Figure 1.
Dimensions of Success Components



A case in point: Karen Rippey of the US Army Corps of Engineers approached David Lewis, UCCE Watershed Management Advisor, about his availability to organize a technical review panel to examine a proposed scope of work for the Russian River Watershed Council's multi-year restoration plan in Northern California. Rippey said, "The RRWC had been developing a scope of work for about a year, and I felt that Dave's meeting facilitation expertise would help to finalize the Russian River Watershed Adaptive Management Plan Scope of Work."

The technical review panel included recognized experts who were respected by the larger community as non-biased and neutral. In his work with the panel, Dave used the results-process-relationship triangle. Panel member Liza Prunuske commented, "We knew we needed to get a result, and we felt well cared for during an agenda that was structured, yet flexible. There was time for conversations during and after meals, getting beyond all the technical and scientific discussions."

Conclusion

Visit the UCCE EF Web site at http://groups.ucanr.org/ANR_Leadership/ to read five case histories that illustrate a wide range of scenarios where the use of EF strategies make a difference in meeting effectiveness and how they benefit community efforts. As a result of this program, the Interaction Associates model of meeting facilitation is rapidly becoming the methodology of choice for more productive and satisfying meetings throughout UCCE.

References

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