Section IV

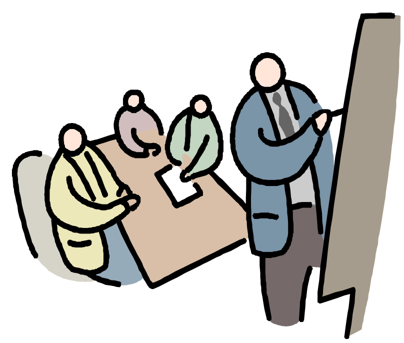
Managing Meetings

Making Meetings Productive

How do you feel when someone proposes a meeting? If you are like most people, you groan and expect to be bored, have your time wasted, cope with other people's turfism, and get nothing done. However, meetings are a standard and often essential way of sharing information, planning, solving problems, developing strategies, and making decisions. They will be the core of your planning work. Managing effective meetings requires commitment and diligence, but including fun and opportunities for networking can also help them go more smoothly. Meetings are expensive—consider the hourly rates of the people involved. Time ill spent in a meeting is time taken away from other important tasks. If participants consider the planning meetings to be a waste of time, they will stop coming.

What Makes a Meeting Work?

There are two important ways to evaluate the success of a meeting. The first is to review the "what." What were the results of the meeting? Did the group accomplish the meeting's purpose? What did you get done? The second way is the "how." How was this meeting worthwhile? How were the decisions made? How did people get along and work to accomplish the meeting's purpose? How do people feel about the time spent working together? How were people encouraged to be involved and innovative? How long did it take to meet the meeting's objectives? How worthwhile was the time? What contributed to the success of the meeting?



How to Get Good Results from a Meeting

- Have a clearly understood and agreed-upon purpose. Don't meet unless you can state the purpose in a sentence.
- Be clear about who should attend the meeting and how they can benefit from as well as contribute to the meeting's goals.
- Define roles in writing. Who facilitates? Who records? Who prepares?
- Have an agenda that is available to everyone before the meeting. Mail or e-mail it with the minutes of the previous meeting.
- Review the agenda at the beginning of the meeting, and make any changes.
- Stick to the agreed-upon time frame. Adjourn early if you finish early. If your habitually run out of time, seek agreement to meet longer in future or form subcommittees empowered to deal with specific issues.
- Consider various ways for sharing information during the meeting: flipcharts, whiteboards, overheads, computer presentations.

- Develop a decision-making process. Voting? Consensus? Majority rules? When to “sleep on it”? Put these decisions in your bylaws.
- Refocus tangential conversation. Relate the group process to the purpose.
- Define clearly decisions that are made. Establish the need for follow-up. Promote and expect accountability.

How to Support the Process of Working Together

- Establish criteria for attendance, share them with the group’s members, and put them in the bylaws.
- Communicate clearly and multiple times, if possible, the date, place, time, and purpose of each meeting.
- Plan the meeting’s physical environment. Consider parking, access, room arrangement, room temperature, noise, lighting, food, etc. Pay attention to special needs (see the chapters on learning styles and promoting consumers’ involvement).
- Have necessary meeting materials organized and available for everyone. Keep them concise, user friendly, and easy to understand. (Don’t assume people read everything beforehand.)
- Send out lengthy or important materials before the meeting so that people have time to review and think about them.
- Make people feel welcomed as they walk in the door. Smile, offer food, inquire about their day, show them where they might sit, and introduce them to one another as needed.
- Particularly if you have newcomers, take the time for “housekeeping” at the beginning of the meeting. Let people know where bathrooms and water fountains are; remind them to turn off cell phones.
- Acknowledge the value of everyone’s time and effort. Be positive about the meeting’s purpose. Invite participants to engage themselves fully in the process. Make participants all knows one other. (Name tags or name tents may be helpful.)
- Facilitate, don’t dictate.
- Develop and write agreed-upon ground rules or the group’s assumptions about how they will work together. Post them where they can be seen at each meeting, and refer to them as necessary.
- Use active listening skills to understand what a participant contributes and to help the group follow along (see the chapter in section III).
- Know and use conflict resolution skills (see the chapter in section III).

- Acknowledge and use differences of opinions to enrich the group process.
- Help participants identify their interests, not just their positions (see the chapter on conflict resolution in section III).
- Find opportunities for levity, and allow time for the group to get to know something about each other.
- Understand the concept of *groupthink* and how to deal with it (see the chapter on managing challenging behaviors in groups in secton III).
- Check in periodically with how the group feels about the progress on their purpose.
- Expect that identifying and solving problems will be messy at times. If it were easy, the group would not have to meet.
- Keep detailed minutes, and archive them.
- Continually thank people for their participation. Follow up as necessary for assignments, promises, and decisions.

Resources

Miller, Robert, and Marilyn Pincus. 2004. *Running a Meeting That Works.* Hauppauge, N.Y.: Barrons.

Hawkins, Charlie. 1997. *First Aid for Meetings.* Wilsonville, Ore.: BookPartners.

Haynes, Marion. 1997. *Effective Meeting Skills: A Pratical Guide for More Productive Meetings.* Menlo Park, Calif.:Crisp.

Before Meetings

- Determine whether a meeting is essential. What are the burning issues that necessitate this meeting? If business can be handled electronically, through phone calls, or with other means, don't have a meeting.
- Plan the meeting carefully, ascertaining who needs to be there, why, when, and for how long. Make sure everyone invited to the meeting knows these details.
- Prepare an agenda and send it to participants. E-mail makes it easier for people to respond immediately about their attendance or requested changes in the agenda. Allow ample advance time for regular mail.
- The more people who come to your meeting, the longer it is likely to be. Consider meetings with fewer participants, but make sure you have a communication network that supports ongoing, prompt sharing of information among all parties.
- Make sure everyone knows why their presence is necessary for the meeting's business. This conveys the need for personal responsibility and honors their efforts to attend.
- Remind everyone who should attend the meeting about one business day before it is scheduled, and give out directions (and parking information) to the meeting one more time. It is also helpful to include a contact phone number in case questions come up (try not to make it yours—you have enough to do).
- Get to the meeting early, and set up the environment so that business can start on time. Post the meeting site on the front door or front desk if the building is large and unfamiliar to some participants.
- Have a clock visible to the facilitator of the meeting.

During Meetings

- Always start on time. If funds permit, reward people with food or beverages if they come early.
- Keep introductions brief (name tents and name tags are useful for this).
- Welcome people, but limit introductory remarks. Set a pace that will allow the meeting to cover the identified tasks and end at the designated time.
- Note any agreed-upon group interaction guidelines or norms. This can help prevent inappropriate behaviors that can stall a meeting.
- Have paper copies of the agenda (see the chapter on parliamentary procedures for tips on formatting agendas), or post it on a flip chart. Make agreed-upon changes and move onto the first item of business.

Time Management

Committees keep minutes and lose hours.

—Unknown

- At the beginning of the meeeting, state what needs to be accomplished. If possible, assign supporting roles before the meeting (a recorder, flip chart writer) and have any materials ready and available (flip charts, markers, computers, pencils, and paper). Taking notes during the meeting on a computer can make it easier and quicker to produce minutes later.
- Don't use meeting time to conduct business that only involves one or two parties. Discuss any issue that isn't relevant to the majority of the team at some other time.
- Limit meeting interruptions by having a group policy on cell phone use, emergency contacts, etc.
- If resource materials are needed, put them on the table or on individuals' chairs beforehand. Do not read the material out loud. Highlight necessary information. Encourage questions or input with openness but with an eye on the task at hand.
- If decisions have to be made, discuss first how group decisions will be made to avoid getting the decision mixed up with the decision-making style.
- Use simple language to convey thoughts, avoid jargon that requires lengthy explanation, and discourage grandstanding. Refocus discussions and tangential comments.
- Focus on one topic or problem at a time. If something appears unsolvable at the time or requires more consideration or information, be willing to set it aside, assign a time when it will be readdressed, and move on.
- To keep the group from endless debate, agree to a time limit on discussion before decisions are made. The group may also assign a person or subcommittee to review and offer prioritized recommendations.
- If your meeting goes beyond 90 minutes, have a 5 to 10 minute refresher break. Be firm about restarting at the end of the break.
- If you business is done before the designated ending time, adjourn. People—and their bosses—will be grateful.
- See the chapter on promoting consumers' participation for tips on helping them participate effectively.

At the End

- Prioritize any next steps.
- Find ways to spread the work around so as not to overburden the dedicated few.
- Establish through group consensus or personal agreement what happens next and who does what.

- Set parameters for accountability. For example, "Mary will send out her list of recommended speakers for our community dialogue within 10 days. Use her e-mail to contact her with your suggestions for names."
- Assign tasks and time limits.
- Decide how and when the minutes will be distributed.
- Ask for any changes in contact information (phone numbers, e-mails, etc.), and have someone write these down for distribution.
- Show genuine appreciation for the cooperation and effective participation of the meetings' membership.
- Highlight the meeting's accomplishments and the roles of the participants. If they feel they and their time were valued, they are more likely to attend and work well together again.

Resources

Hochheiser, Robert. 1998. *Time Managment.* Hauppauge, N.Y.: Barrons. (See especially chapter 11 on meetings.)

Frank, Milo. 1989. *How to Run a Successful Meeting in 1/2 the Time.* New York: Simon and Schuster.

Facilitation

Facilitating small and large groups is an integral part of any planning initiative. A facilitator plays a central role in creating a welcoming and inclusive environment, involving participants in the process, and promoting a "flow" that enables the group to achieve its goals. Facilitation is more about the *how* a group works together than the *what* or content of their work.

Often planning groups are faced with the question of when to use internal group members to the facilitate their work and when to hire an outside facilitator. The answer is, "It depends." For most small group work such as regular planning meetings, task groups, and committees, existing members can do this task. It is usually helpful to communicate roles and functions of in-house facilitators early on.

Consider rotating facilitators. Not only does this ease the burden on any one person, but it provides others with an opportunity for professional growth in the art of group facilitation. In fact, it is generally not a good idea for representative of the lead agent of the community planning effort to always be the facilitator. When this happens, it may be hard to separate the planning effort from the leader's (or lead agency's) identity and influence. This may cause other members to perceive the leader as controlling the outcome regardless of anyone else's perspective, which discourages their full participation. The facilitator's repeated assurances of neutrality may not change this perception.

Facilitation is about creating a space in which people can empower themselves.

—Dale Hunter

For meetings with high stakes or for the discussion of topics where opinion is sharply divided, you may want to seek the services of an experienced facilitator. Such meetings might include focus groups, retreats, problem-solving sessions, strategic planning, and community dialogues or town meetings. An experienced, neutral, outside facilitator can also help your group get "unstuck" in emotionally charged situations by assisting in focusing on key issues, making decisions in the way the group has already agreed on, and moving forward.

The term *facilitator* comes from the Latin word *facere*, which means "to do" or "to make easy." An effective facilitator makes the group's work easier by following some guidelines.

1. Commit yourself to playing as neutral a role as possible. Your job is to promote the communication and problem solving of the group using the participants' experience and ideas. If the facilitator weighs in with his or her own opinions, or acknowledges with body language or verbal communication the "best" answer, it can short-circuit the group process. Then the group may look to the facilitator for answers instead of finding their own or feel the facilitator is taking sides or has a private agenda.

2. Prepare the physical environment ahead of time so that it welcomes participants and takes into consideration any needs for special assistance (see the chapter on encouraging consumer participation). Assure that all needed equipment and materials are available. Facilitators do not have to do these preparations themselves, but they do need to assure they are completed in time.
3. Know the target audience, their interests and positions, and the likely controversial points. Even though other surprises may emerge, knowing this ahead of time helps the facilitator be emotionally prepared. This is particularly important in situations where there is considerable dissent among group members.
4. Outside facilitators should review the agenda of the meeting with the planning team, and it is preferable that the facilitator be involved with creating the structure of the meeting from the beginning. Be very clear on who does what. For example: Who will do the opening, introductions, icebreakers, and closing? Who will inform the group of any housekeeping details such as breaks, bathroom locations, and phone use? Will there be someone to help hand out materials? To take notes on the flip chart? To manage any equipment? Will ground rules and norms be created? What needs to be recorded, and who will do that? Do small groups require leaders, and how will they know what to do?
5. Know the dynamics of group process and how to handle challenging situations such as hostile participants, group members who do not contribute, unfocused discussions, breakdowns in communication, and environmental distractions that may affect the meeting (see the chapter on managing difficult behaviors in groups). Remember that if things can go awry, they usually will. Keeping a calm and professional demeanor whatever the situation will encourage the participants to do the same.
6. Be skilled in using techniques for keeping the group energized and focused on the task, encouraging creative thinking, building consensus, and keeping all group members involved at levels comfortable to the individuals. Don’t be afraid to insert a little fun into the work.
7. Use effective communication skills such as active listening, paraphrasing comments for the entire group to consider, observing body language, and adjusting the tone and pace of the meeting accordingly. Al-

ways treat groups members with respect and interest in their contributions.

8. Generate a feeling of openness. Create spaces that encourage group communication—small circular tables, U-shaped seating arrangements, or other configurations that support equality and accessibility. If participants can't hear one another, they will not benefit from each other.
9. Be comfortable with silence. This may allow time and space for reflection, encourage introverted people to speak up, and help the group as a whole feel able to make deliberate decisions without time pressures.
10. Never embarrass a participant or group. Use humor judiciously and carefully. If ground rules have to be reinforced to enable the group to work more productively together, do it within the spirit of the mission of the group and build on the mutual decision that the task is important and worthy of this group's best effort.

A good facilitator knows how to guide the group through a cooperative and participatory process that leads to the decision making that achieves the group's task. It requires a combination of skills, intuition, and a certain amount of fearlessness. No one resource can cover every technique to use or situation that a facilitator may face. However, if you approach the group process with a firm belief that full participation leads to better outcomes, a desire for diverse thoughts and opinions to emerge, a trust in the group's good intentions, and confidence in your ability to support them in achieving *their* goals, you can be successful. You will be most effective when you are being genuine and your natural self. Don't posture or pretend you are the expert by becoming formal and aloof. Your most important asset is your awareness of how the group is feeling, responding, and processing the circumstances. This awareness is critical to moving the process along or slowing it down so that people continue to be as fully engaged as possible. This supports the group in accomplishing more than they probably thought possible and creates excitement and commitment to their vision.

Resources

Hunter, D., A. Bailey, and B. Taylor. 1995. *The Art of Facilitation.* Tucson, Ariz.: Fisher.

Justice, Thomas, and David Jamieson. 1999. *The Facilitator's Field Book.* New York: HRD Press.

Kaner, Sam, Lenny Lind, Sarah Frisk, and Duane Berger. 1996. *Facilitator's Guide to Participatory Decision-Making.* Gabriola Island, British Columbia: New Society.

Putz, Gregory. 2002. *Facilitation Skills: Helping Groups Make Decisions.* Bountiful, Utah: Deep Space Technology Company.

Schwarz, Roger M. 1994. *The Skilled Facilitator: Practical Wisdom for Developing Effective Groups.* San Francisco: Jossey-Bass.

Minutes

What Are Minutes?*

- an official record of the proceedings of a meeting, given to members before the start of the next meeting
- a reminder of what happened at a meeting
- a record of who is to undertake certain actions before the next meeting
- a basis for discussion of matters arising at the next meeting
- a permanent record of your team's discussions and progress.

Why Should a Team Take Minutes?

- Permanently recording a meeting lets people know that they have been listened to.
- Minutes provide a historical record that can be used in future meetings for verification of decisions and as a reminder of events and actions.
- Minutes can provide important information to people who were unable to attend the meeting.
- Minutes help keep everyone on track. If a group knows that everything is being documented, it will be more likely to stick to the agenda and act kindly to one another.
- People are less likely to repeat themselves from meeting to meeting if they feel their concern or issue has been documented.

However, it is not necessary to take minutes if the meeting is very short, extremely casual, or informal; if the level of trust is high among participants; if the reason for the meeting is primarily social; or if no significant decisions or actions will be taken (however, it may be very important to document the content of an "informational" meeting).

What Are Different Ways to Take Minutes?

- Take written minutes and transcribe them after the meeting.
- Record key points on a flipchart, chalkboard, or whiteboard, and have someone document them at the end of the meeting.
- Tape-record the meeting and type up key points (or make a complete transcript, though this is rarely called for) after the meeting. Remember to ask permission of everyone in the room to record their remarks.

*Reprinted with adaptations from Jenette Nagy and Bill Berkowitz, Capturing what people say: Tips for recording a meeting, *The Community Toolbox,* http://ctb.ku.edu/tools/en/sub_section_main_1155.htm

- Type the minutes directly onto a computer during the meeting (though you may need to edit and correct afterward).

What Should Be Included in the Minutes?

- name of the group, place, time, and date of the meeting
- names of committee members present (send a sign-in sheet around during the meeting)
- names of committee members excused or absent
- list of observers and guests, including their affiliation
- a statement that the minutes of the previous meeting were approved as read or revised
- key items discussed in the order listed on the agenda, with a brief description of the discussion (an actual transcript is usually unnecessary), important comments, decisions, questions, and action steps. It is also very important to document any motions made, the names of the people originating the motion, whether the motion was accepted or rejected, and how the vote was taken (show of hands, voice vote, or other method). If a member of the committee is assigned a specific task, be sure to state the person's name and the responsibility accepted.
- the time the meeting was adjourned and the date, time, and place of the next meeting (with directions if necessary)
- the recorder's name and signature
- a sheet attached to the minutes entitled "Action Items" that lists any action agreed to, the responsible committee member, and the due date.

By having a clear, complete record of the meeting's events, you can be sure that these decisions won't just be forgotten when you turn out the lights and lock the door.

—Jenette Nagy and Bill Berkowitz

Some Tips for Taking Good Minutes?

- Sit next to the chairperson, if possible, for help or clarification during meetings.
- Remain neutral in your documentation.
- Be as clear and concise as possible.
- Don't try to write every single word unless the exact wording of a statement is important (for example, if the group decides on a mission or vision statement, it should be included exactly as agreed). In most cases, though, it is sufficient to paraphrase what was said, but be alert to the possibility of making changes in meaning.
- If important decisions have been made during the meeting or tasks assigned, you may wish to take the last few minutes of the meeting to review them with the group to be certain that you have recorded them accurately.

- Follow the agenda exactly, with identical numbers and headings, for easy reading and reference. If items were addressed out of order, make a note of it.
- You may wish to use the bolding or italicizing functions in word-processing programs to make items stand out, but be restrained in doing so. Nothing stands out in a page where everything is bold or italicized. Be consistent—if you bold the agenda items, for example, do it everywhere. If you italicize decisions, do it everywhere.
- Use separate paragraphs for each item.
- Use short sentences if possible.
- Don't worry about spelling and grammar while you are taking the minutes, so long as you are able to interpret your notes correctly later. You can fix spelling or grammatical mistakes when you prepare your final copy.
- At a minimum, number the pages of the minutes. You may find it helpful to have a footer that mentions the date and the page number.

Archives of the Process

There is little point in taking minutes if there is no plan for maintaining at least one copy somewhere for the duration of the planning initiative (and perhaps beyond). One of the early tasks of the planning group will be to designate an official historian, who is responsible for retaining minutes and copies of other relevant documents generated by the process.

Resources

Burleson, C. W. 1990. *Effective Meetings: The Complete Guide*. New York: John Wiley.

Gutman, Joanna. 1998. *I Hate Taking Minutes!* London: Kogan Page

Gutman, Joanna. 2001. *Taking Minutes of Meetings (Creating Success)*. London: Kogan Page.

Nagy, Jenette, and Bill Berkowitz. Capturing what people say: Tips for recording a meeting. *The Community Toolbox,* http://ctb.ku.edu/tools/en/sub_section_main_1155.htm

Learning Styles and the Decision-making Process

The mind is not a vessel to be filled, but a fire to be kindled.

—Plutarch

You have probably noticed that when you are learning something new, you feel more comfortable with a certain method of learning or type of instructor. Some people jump into a new activity, wanting immediate hands-on experience. Others want to read or hear and think about the new information, and still others prefer to study pictures or diagrams. All of these preferences are *learning styles*, and you may use different ones depending on what you are trying to learn.

According to Roger Smith, learning styles are "the highly individualized ways we take in, process, and organize information. Our preferred learning style is the natural channel we use to learn most quickly, easily, and effectively." Three ways of thinking about them will be briefly discussed in this chapter (and another one in the chapter on presentations). Despite their differences, the common implication of these perspectives on how people learn is that there is no right or wrong style to use, and the key to maximizing learning among your planning team members is to understand and respect differences and to offer opportunities for people who use all styles to build on their strengths.

Additionally, some community members who participate in your planning effort may have deficits or disabilities in one or more areas that affect their learning, participation, and interactions. Understanding how to meet their needs by incorporating different learning and information processing modes and building on their assets can help make them feel more welcomed and involved.

Learning Styles

The VAK model

The VAK model identifies three styles of learning based on the sensory input favored—*v*isual, *a*uditory, or *k*inesthetic/tactile. One of the keys to identifying which of the styles individuals favor is to listen closely to their language, which offers helpful clues.

Visual learners prefer to use their eyes to learn—looking at pictures and watching demonstrations helps them understand. They may use words like, "I see," or "I imagine," or "I can picture what you are talking about" when they talk. Visual learners like overhead transparencies and other presentation methods that rely on graphic display. However, they can become impatient with having to read a lot of material to gain understanding. They often remember faces better than names and prefer face-to-face meetings to phone conversations or extensive e-mail correspondence.

Auditory Learners like to hear stories or verbal instructions rather than review diagrams or other graphic representation. They might use phrases such as "That sounds like a good idea," or

“Tell me about it.” They like people “talking them through” a process and enjoy dialogue and phone conversations.

Kinesthetic/tactile learners prefer doing or experiencing the thing they wish to learn—a hands-on approach. They may become impatient with verbal or graphic directions but learn quickly by “feeling” their way through and may want to try something immediately. They often remember best what they did or felt about a situation rather than the exact words that were said. They may use action or feeling words such as “let’s move on” or “this feels right.”

David Kolb’s model

Kolb’s framework for learning, which is both a learning process and style, is a useful model to consider as you create and adapt materials and group processes for participants. The four styles he identifies that people use to incorporate new ideas into their own reality distinguish among preferences for feeling, watching, thinking, or doing. His cycle of learning incorporates all of the styles as part of the process. Although he believes that people use all the styles to learn, he suggests that they differ in which style they prefer to begin and continue the learning process.

Activists (or Accommodators) learn by doing and prefer “hands-on work” and active experimentation. They solve problems by following their intuition rather than detailed information. People with this style like to work in groups by brainstorming and trying out new solutions.

Reflectors (or Divergers) learn by watching and reflecting on their observations. They like ideas but need the time to gather enough information before committing to a plan of action. Once inspired, they can be very imaginative and visionary.

Theorists (or Assimilators) want to understand by creating models and frameworks and build new ideas on the things they already know. They prefer a step-by-by approach and value research to gain a clear idea of how something might work.

Pragmatists (or Convergers) want to know the practicality of a new idea and how it would work in real life. They value expert opinion and guidance.

Multiple intelligences

Howard Gardner redefined the traditional understanding of intelligence as measured by a single quotient (IQ) by developing a theory and set of multiple intelligences. Educators were particularly attracted to his work because of its impact on how to assess students and develop more individualized learning opportunities. Gardner conceptualized eight different faculties that are valued within any given culture. The most important implication of his work is to understand, identify, and appreciate the diversity of strengths in any individual, and to develop ways to use these multiple intelligences. Someone with

- *musical Intelligence* likes to sing or play an instrument and learns best through rhythm and music-related activities. Strengths are remembering melodies and keeping rhythms.
- *bodily/kinesthetic intelligence* likes to move around and use body language and learns best through physical action and interacting with space. Strengths are physical activities.
- *logical-mathematical intelligence* likes to work with numbers, ask questions, and do experiments and learns best by categorizing and classifying information. Strengths are math and logical problem solving.
- *linguistic intelligence* likes to read and write and learns best by hearing, saying, and seeing words. Strengths are remembering details.
- *spatial Intelligence* likes to build and draw things and learns through visualization. Strengths are imagination, reading maps, and doing puzzles.
- *naturalistic Intelligence* likes to be outside, interacting with animals and nature and learns by studying natural phenomena and figuring out how things work. Strengths are understanding and engaging with nature.
- *interpersonal intelligence* likes to interact in groups and talk to people and learns by relating and sharing with others. Strengths are organizing, leading, and communicating.
- *intrapersonal intelligence* likes to work alone and learns best through self-pacing and solitary work. Strengths are understanding self, being original, and following instincts.

Using Learning Styles to Enhance Community Planning Activities

A necessary part of community planning is the transfer of new information from person to person. This may take the form of volunteer training, meetings, workshops, community dialogues, study groups, telephone conferencing, and videoconferencing. Every group will be made up of individuals with different preferred learning styles. Understanding, appreciating, and planning for the various styles will increase the likelihood of individual and group success and satisfaction. Thus your participants are more likely to be engaged and involved in the processes supporting your planning initiative. Looking for ways to use their learning styles will help them feel needed, useful, and appreciated.

Here are some ways to use this information on different ways of learning to enrich your community planning experience.

- Plan events and group activities (particularly those which require new learning) with participants' attention span (usually 15 to 20 minutes per segment) in mind. Build in breaks and appeal to different styles by mixing visual, verbal, and experiential materials and activities that draw on different strengths.
- Produce written materials and documents that incorporate pictures, graphics, and other visually stimulating things to supplement the spoken words of the meeting.
- Review your writers' use of learning style "words" in written materials. Writers (and presenters) tend to write and present in their preferred styles. Vary words and phrases that speak to the different styles (i.e., visual, auditory, and kinesthetic words).
- Match tasks and positions to people's strengths. A theorist may be a good match for researching and a pragmatist may help keep a group's plan grounded in the community's reality. Activists can energize groups. Those with high interpersonal intelligence might be excellent group facilitators.
- In any group, mix extroverts and introverts, reflectors and activists, pragmatists and dreamers. Manage the group process so that each has an opportunity to use his or her strength. For example, provide time for people who need to reflect before they speak or act by pacing the group process so it is not always rushed or moving at a fast pace. Short stretch breaks during discussions or before voting may be helpful to the reflectors. Provide dreamers and visionaries with a forum for their creative thoughts, and use pragmatists to help see things realistically.
- Model appreciation of different strengths and gifts. Look on this as essential to the success of your planning.
- Pay attention to cultural differences in learning styles and preferred ways of interacting. Look for guides in your group or community to help understand the nuances and essential themes.
- Don't make the assumption that a person who usually prefers and acts through a particular style will always use that style.

Minimizing Barriers to Learning

Ultimately, using common sense and basic adult learning principles as guidelines for community work will assist leaders in providing stimulating and personally rewarding learning environments. The guidelines developed by Stephen Brookfield in *Understanding and Facilitating Adult Learning* could serve any group well by providing a sound foundation for group norms. His six leading principles of adult education are:

- voluntary participation in learning
- mutual respect among participants
- collaborative facilitation
- a practical and systematic approach to teaching and learning
- the necessity of critical reflection upon the breadth of life
- a proactive and self-directed empowerment of participants.

Use your understanding of learning styles and ways to process information to meet the needs of community planning participants who may have disabilities that limit how they take in information. The understanding that people have different ways of expressing what they are good at will help you and others appreciate how they might contribute. Interacting respectfully and inclusively with people with impairments is critical to developing long-term care in your community, because these are your principal consumers who know first-hand the barriers and successes of the long-term care system. General strategies for making your environment more welcoming are in the chapter on creating a consumer-friendly planning process, but here are some suggestions for accommodating participants with specific impairments.

The secret of education is respecting the pupil.
—Ralph Waldo Emerson

For people with visual impairments

- If the impairment is mild (e.g., age-related visual deficits), use larger and clearer fonts (14 or above, Arial or Times Roman), clearly defined pictures, contrasting colors, and a reasonable amount of white space in written materials. Avoid using red or green print.
- If the impairment is more profound, ask participants what works for them. How do they learn and participate best? Do they need someone to explain or read things during events or meetings? Would a tape recorder be useful? How should written materials be presented to them? For example, would they prefer a document that someone can read to them or a diskette that their computer can read aloud?
- Ask group leaders and presenters not only to present information but also to describe what is happening. For example: “I am going to take a moment to write the group’s ideas on the flip chart to make sure I heard them all,” or “The round tables that everyone is sitting at will help us in our group work.” Find ways

to help people with visual impairments understand the materials participants are likely to skim that the group leader will not read (e.g., the agenda, directions for an activity, minutes from the last meeting).

- Send written materials—the agenda and background information—ahead of time.
- Explain what is going on if the room suddenly gets quiet or a change occurs that a person with visual impairments might miss. For example: “It will take me a minute or two to get the VCR set up.”
- Be aware of the environment and how it will affect the way people with visual impairments get from one place to another. They may have a preferred place to sit. Ask them how assistance can best be provided. Be considerate of their needs without attracting public attention. (Plan ahead!)
- If guide animals accompany the person, make sure everyone understands to treat it as a working animal, not a pet.
- Make sure the person with visual impairments is introduced to people sitting around him or her in a large audience or for a small group activity.
- Use a normal tone of voice; don’t raise your voice as though the person were hard of hearing.
- Speak directly to the person and even maintain eye contact. This natural body language can reduce your own awkwardness, which otherwise will be conveyed in your speech.
- In getting to know them, inquire about their interests, preferred activities, and sources of pleasure and relaxation. This will help you understand their strengths and learning styles.

For people with hearing deficits

- See the web links to regional centers for the deaf and hard of hearing and local assistive technology resources at the end of this chapter.
- Consider seating arrangements as well as sound equipment that might benefit the person with limited hearing.
- Tell any speakers to keep their mouths uncovered when talking and always to face the audience, so that lip readers can keep up with what is going on.
- Ask the person with the hearing impairment what written materials would help facilitate participation in the group process.
- Find out how the person prefers to be contacted: TDD/TTY? e-mail? Some other way?

- Because understanding may rely heavily on seeing body language, make sure the person has a clear view of all speakers and group members.
- Use visual aids to augment understanding of the spoken information. For example, when you give directions for a group activity, write them out or show them on an overhead, as well as saying them. (This helps all group members, not just those with hearing disabilities.)
- Be aware of environmental distractions or background noises such as the humming of air conditioners, hallway traffic, or doors that open and close frequently that might interfere with hearing. Sounds taken for granted and normally ignored by people with no disability are amplified by a hearing aid, which may make distinguishing speech more difficult.
- If an interpreter is used, look directly at the person with the impairment when you speak, not at the interpreter. However, be respectful of the interpreter by greeting and welcoming them.

For people with mobility impairments

- Always review accessibility issues. Especially take note of parking, entrances, and bathrooms (and the path to the bathroom).
- Ask where people with mobility impairments prefer to be seated.
- Try to find opportunities for the person in a wheelchair to interact with people at their eye level.
- Don't assume that activities that require moving around precludes their involvement. Find roles for them that will draw on their strengths and illustrate their active participation to the group.
- Be aware of any fatigue factors that may affect a person's involvement with the group. Be sensitive about building in breaks, shorter activities, or using mentors and volunteers to partner with them to enhance their experience.
- Remember, people use wheelchairs; they are not "wheelchair bound."
- Extend the usual social graces such as handshakes, good eye contact, and a light friendly touch on the arm (if appropriate). Don't hold on to or lean against a wheelchair. This invades the person's space, and it could be dangerous.
- When conversing, speak directly to a person in a wheelchair, not to their attendant. However, greet and acknowledge the attendant.

Note: It is all right to use common idioms that include the verbs see, hear, and walk. Trying to eliminate these words creates discomfort and unnecessary awkwardness.

For people with impaired cognition

Cognitive impairment can result from developmental disabilities, injuries, or dementing processes.

- Be clear in understanding the person's preferred styles of learning. Don't assume he or she can't read, write, or actively engage in a group process.
- When interacting with people with cognitive impairment, speak in a normal, adult tone of voice.
- Use a variety of styles in the group process to maximize the likelihood of their understanding, learning, and contributing.
- Assess the overuse or reliance of one style of information transfer (e.g., printed words). Find creative ways to incorporate pictures and other visual cues for nonreaders that are not patronizing (childlike).
- If possible, break down tasks or concepts in smaller components and steps to enhance their understanding. Use concrete terms and simple language.
- Avoid separating them into a group that is obviously different from all the others. Strive for inclusion and support.
- Avoid talking around the person as though they can't understand anything. Ask social questions that you would of anyone else and inquire about what assistance may be helpful.
- If participants will be expected to write down information and perhaps even turn it in (such as an evaluation or prioritized list), adapt this expectation for nonreaders (or others with fine motor deficits) ahead of time. Perhaps have a volunteer read the information and write their responses down or do a group report.
- Welcome volunteers, mentors, or advocates who will help the person with cognitive disabilities join in the group work. Model acceptance.

Resources

[Anon.] http://sfu.ewb.ca/documents/vaklearningstyles.pdf (VAK learning style chart)

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To assist adults who have perceptual/learning difficulties

Independent Living Resource Center. 2003. *In Our Shoes: A Guide to Disability Etiquette and Positive Interactions.* http://www.ilrctbay.com/upload/documents/inourshoes_ilrc_publication.pdf (This website provides practical strategies for working with people with disabilities).
Division of Services for the Blind District Offices, http://www.dhhs.state.nc.us/dsb/map_do.htm
Interpreter Directory http://dsdhh.dhhs.state.nc.us/division/interpreter/interpreter.html
Regional Resource Centers for the Deaf and Hard of Hearing http://dsdhh.dhhs.state.nc.us/division/rrc/rrc.html

Group Decision Making and Process

Group decision making is the heart of community planning. Done well, the community benefits from the exciting process of diverse citizens agreeing on common ground and committing themselves to action. Done poorly, people may feel disfranchised, angry, and disengaged, and the community loses an opportunity to improve. Several factors increase the efficacy of group decision making:

- clear and consistent project goals
- acknowledgment of the value of group process and procedures
- effective meetings with engaged participants
- successful conflict resolution
- good communication networks
- appreciation of different leadership and communication styles
- agreed-upon group norms.

One of the most important things a group engaged in community planning can do to support effective group process is to identify a clear and shared set of goals. This involves creating a vision and mission and ultimately an action plan. A group without a shared direction and purpose will be aimless and ineffective in the long run. A group that takes the time at the start to develop its purpose, processes, and procedures to achieve specific outcomes stands the best chance of being productive.

Managing groups effectively requires an understanding of group process. In 1965 Bruce Tuckman theorized that as groups develop they pass through four stages, which he named *forming, storming, norming,* and *performing*. Recognizing these stages helps facilitate communication and decision making. Rather than expecting the group to work well throughout the entire process, leaders and facilitators can identify issues associated with each stage as they arise and help move the group to the next level. Group development is not always smooth or sequential. Especially in groups that have members coming and going at different times, growth can be challenging and they easily fall back into less effective modes of interaction. The goal is to support the group's growth through all the stages, through effective communication, establishment of norms, well-run meetings, useful decision-making strategies, and purposeful tasks.

Tuckman's Stages

Stage One, Forming. Group members get to know one another and determine goals and purpose. Communication is generally polite and perhaps guarded.

Stage Two, Storming. Communication breakdowns occur as members compete with one another and establish individual agendas, perhaps in competition with the group's established purpose. Subgroups may form and tensions surface. The group begins to respond by setting boundaries and norms.

Stage Three, Norming. Group members strive to agree on roles and responsibilities. Decision-making strategies for solving problems and developing plans of action become legitimatized. Group work becomes more focused and trust begins to build.

Stage Four, Performing. Teamwork is collaborative and members genuinely care about one another's contributions and talents. Motivation and confidence are high and members work hard to solve problems, achieve goals, and become interdependent.

Because group members are individuals with different opinions, levels of experience, and knowledge, decision making can be challenging through all stages. Ideally, group decisions should be based on *all* members' input. In community planning efforts, the decision making may rest with a planning team, who, for sustainability and respect for their constituencies will consider all input and, after informal and formal analysis, create the action plan. Effective decision making, in this case, should generate more ideas than will be used, support a high level of participation of all interested parties, develop a climate of trust, and orient tasks toward established goals.

There are several decision-making strategies groups can use to identify and solve problems.

1. *Brainstorming.* In brainstorming sessions, group members call out ideas with no preconceptions or judgments. A recorder lists all ideas with no discussion. The group then discusses, combines ideas, and lists the most viable. A formal or informal vote can be taken to identify the most promising options. This strategy promotes creativity and teamwork.
2. *Majority rule.* This often-used strategy counts votes (either secret or through a show of hands) after group discussion and review of any relevant material and information. Easily understood, this strategy is quick and simple to use. However, group members may feel group pressure to vote in a particular way or feel devalued if they are outvoted by the more powerful segment. "Losers" may decrease their commitment to the project and leave the group.
3. *Consensus.* This strategy is similar to majority rule but ideally more inclusive. Rather than simply list known alternatives, debate for a short time, vote, and then accept or reject by some percentage of majority (say 50 percent plus one, or two-thirds of the group), a decision making by consensus involves generating new alternatives, combining elements of several al-

ternatives, and often spending considerably more time in debate and in checking that people understand a proposal or an argument. All participants should feel that their opinion is valued and heard. With skilled facilitation, the group will come to a point where everyone will agree that, under the circumstances, which may not be ideal, the decision is a fair and workable one that everyone can live with and support. Facilitation of group communication and conflict management is key to this strategy, so that dominant individuals do not rule and squelch disagreement. Listening and considering all points of view in order to arrive at a "good enough" solution takes time. Full participation increases acceptance, though, and may support a more sustained effort toward achieving goals.

In decision-making strategies like consensus, effective communication is paramount and built on respect for diverse opinions. Skilled facilitators and group leaders often help groups create norms or guidelines of behaviors for their work together. This code of conduct keeps a group functioning as a system instead of a collection of individuals. Norms can help control behavior and strengthen the members' commitment to the group process. If a group discusses and puts their norms or guidelines in writing (and even posts them for all group meetings) expectations are clear. Violation of a norm can be handled with a calm but focused group discussion that will often help the group makes decisions about its membership (i.e., should a violator leave?) or develop strategies to improve the group's work. Development of these behavioral guidelines works best when done at the beginning of any group effort, but it can also be useful for short-term group work. Group members should develop their own list of guidelines within a context of cooperation and desire to work well together. The group facilitator can elicit ideas from the group's members or jumpstart the discussion with some suggestions to consider.

Here are some suggested guidelines:

1. We will listen with respect for and interest in diverse opinions.
2. We will disagree but not disagreeably.
3. We will expect conflict and manage it constructively.
4. We will begin and end meetings on time.
5. We will listen to each other and not interrupt.
6. We will make sure everyone has had a chance to speak.
7. We will support our facilitator's efforts to moderate discussions.
8. We will avoid ethnic, age-based, or gender-based humor.

9. We will speak respectfully to each other.
10. We will bring before the whole all group concerns regarding our group cohesion.

A Process for Setting Norms

1. On a flip chart list all the members' ideas for guidelines.
2. Have a period for questions and clarifications so that everyone understands what each of the proposed norms mean. Combine ideas and reword as needed. Continue until every team member is satisfied that everyone understands each others' suggestions.
3. Go through the list item by item to see which items all members want to adopt. It should be understood that if any team member does not approve of a proposed norm, it will be eliminated or changed.
4. If the list of approved items is longer than ten items try to reduce the list by simplifying and combining.
5. Make sure all team members are comfortable with any revisions.
6. Adopt the set of group norms.
7. Post group norms for every meeting, if possible.
8. Refer to the norms promptly if they are violated.

Resources

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Parliamentary Procedure and Robert's Rules of Order

Parliamentary procedure is a set of basic rules for conducting business at meetings. Its purpose is to ensure fair, orderly, and prompt facilitation and equal opportunities for all group members to participate and contribute. The most popular set of parliamentary procedures is *Robert's Rules of Order.* Although it is over 125 years old, it is still regarded as the definitive source of information and guidance on parliamentary procedure. You and your team may find it helpful to include some of its recommendations in your planning team's bylaws to help the process move as smoothly as possible.

General Principles

- *Robert's Rules of Order* should not be used so strictly as to squelch discussion in a meeting or intimidate members.
- The planning team rules the process. The agenda is merely a recommendation, and the planning team has the right to make changes.
- All members of your planning team have equal rights, privileges, and duties, and it is the duty of the chairperson or lead agent to ensure that all people are treated equally during meetings.
- Rules must be administered fairly.
- Every member of the team has the right to understand an issue, question, or motion.
- There should be full and free discussion of motions, reports, and other items of business, especially before a vote is taken.
- A majority vote decides an issue, but the minority opinion also has rights that must be protected (such as the right to be heard and the right to oppose the majority).
- Only one issue, question, or motion may be addressed at a time.
- Members must be courteous and are never allowed to attack other members.

Brief Overview of Specific Procedures in *Robert's Rules of Order*

1. *The agenda.* Most organizations and committees that follow *Robert's Rules of Order* stick to a basic agenda for each meeting. For example,
   I. Call to order
   II. Roll call of members present
   III. Vote on the minutes from the previous meeting
   IV. Committee reports

V. Special orders (which are important matters of business from previous meetings that were designated to be discussed at this time)
VI. Unfinished Business
VII. New Business (you will probably want to add details about the new business for consideration on your agenda so members will know what is planned and what they should prepare for)
VIII. Announcements
IX. Adjournment

2. *Quorum.* A quorum is the minimum number of planning team members who must be present at a meeting before the business of the meeting can be transacted. The quorum requirement should be specified in your team's bylaws or rules. Most organizations require a majority, or greater than 50 percent, to be in attendance for a quorum to be called.
3. *Obtaining the Floor.* Before a team member can speak, he or she must first be recognized by the chairperson.
4. *Motions.* Motions are made by members to introduce items in a meeting (main motion), change or affect how another motion is handled (subsidiary motion), bring up items that are urgent or that affect pending business (privileged motion), and to question the procedures in a meeting (incidental motion). This is the procedure for making a motion:
   - The member is recognized by the chairperson.
   - The member gives his/her name and states the motion (e.g., "I move that we ask the transportation department to supply us with the needed data before the next meeting.").
   - The member may give a brief explanation of the reason for the motion.
   - Another member must second the motion, or it is lost (however, a motion made by a committee requires no second).
   - If the motion is seconded, the chairperson calls for discussion on the motion.
   - Once the motion is presented to the team by the chairperson, it becomes "assembly property" and can't be changed without consent of the other members.
   - The planning team either debates the motion or moves directly to a vote.

   Common motions include:
   - *Motion to table:* Used to "kill" a motion.

- *Motion to refer to committee:* Used when it becomes clear that more information or further work is required before voting on a motion.
- *Removing a motion from the table:* Used to recall a tabled motion.
- *Motion to postpone:* Used to postpone a vote or action until a specified time.
- *Motion to adjourn:* Used to end the meeting.
- *Motion to call to question:* Used to end debate and force the team to vote. Make sure to record the motion's exact wording, who originated the motion, who seconded it, and the results of the vote in your minutes.

5. *Voting.* The voting rules for your planning team should be spelled out in your team's bylaws or rules (either majority vote—the most common—which is more than half the team members or two-thirds vote, which is more than two-thirds of your members). Voting rules can vary from situation to situation, as long as it is clearly indicated in your bylaws. Votes can be made by voice ("aye" or "nay"), roll call (each member votes when their name is called), raised hands, or secret ballots.

The object of Rules of Order *is to assist an assembly to accomplish in the best possible manner the work for which it was designed.*
—Gen. Henry M. Robert

Resources

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Robert's Rules Terminology at the University of Adelaide Library. http://www.library.adelaide.edu.au/gen/parl/parl_bib.html

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