Working with Task Groups

Working Efficiently with Committees and Teams

Teamwork divides the task and multiplies the success.

Benchmark Institute 2010

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WORKING WITH TASK GROUPS

INTRODUCTION

Much of the work of legal services is accomplished through task groups such as committees and teams. As part of your responsibilities, you may find yourself leading these groups for regular staff meetings, organizational discussions, training/updating staff, and case planning.

There are many advantages to working in groups, but there are disadvantages as well—as almost anyone will tell you.

Groups are a legitimate and effective way of getting work done, especially if that work is highly complex. In most instances groups produce more ideas, a wider range of options, and more creative approaches than individuals alone. Yet, anyone who has had to coordinate activities and reach decisions with several other people is aware of how frustrating group work can be. There’s no doubt that getting work done through groups requires time, effort, and considerable fortitude—all of which can be in short supply in temporary task groups such as those most training-responsible staff will experience. Despite the frustrations, we continue to work in groups because we recognize that it takes more than one person’s energy, knowledge, skills, and time to get any complex job done at all.

Most often, however, groups are not formed and/or managed effectively, thereby failing to take advantage of the greater resources and expertise inherent in a group effort. Meetings, the major vehicle through which group members interact to plan, make decisions and evaluate their work, are frequently poorly planned and managed. They are often a source of frustration, resentment and even anger. How frequently have you thought, expressed or heard the following expressed?

- "I don't know if I can sit through another two hours of listening to people repeat themselves."
- "This committee never gets anywhere. This time I'll take some other work to do while they're rambling on in the meeting."
- "I've got more important things to do than sit around in this room and listen to you two fight."

- “I wish he/she would shut up already so we can get on with our business."
- "We never seem to get through our agenda."
- "We're not doing anything here that a memo couldn't have taken care of."
- “I could have the work completed in the time it took the team to decide what to do."
- "You mean I've come all this way and the meeting has been cancelled?
  Why didn't someone tell me?"

Feelings and thoughts like these are clear indications that something is amiss in the planning and leadership of these group meetings.

In this manual we aim to improve your understanding of the factors that make task groups effective and your ability to lead the various teams and committees for which you are responsible. But, aside from the obvious benefit of having more productive work groups, why is this important to you and your organization? An effective team or committee is an excellent source of publicity for the training function. Members who experience personal development, achievement and satisfaction through their membership on a team will talk about that experience to others. Thus, you can often build a political support base for your operation through carefully planned and managed task group efforts.

CONSIDERATIONS IN EFFECTIVE WORK GROUPS

First, what is an effective task group or team? How do we know when we observe or experience one? Effective work groups can be assessed on three (3) dimensions: productivity, member satisfaction and development. Productivity is the group's achievement of its goals; member satisfaction refers to how well individuals like working in the group and what they personally derive from their membership in the group; development refers to how much opportunity the group offers its members to expand their knowledge and skills. But the assessed effectiveness of the task group on these dimensions will depend upon several factors:

a) the group's size and membership,

b) the group's purpose, goals and task,

c) the group's interpersonal dynamics (process considerations).

GROUP SIZE AND MEMBERSHIP

What size should the group be? Who should be a member? What criteria should be used in selecting members--expertise (skills, knowledge, experience), membership in other role groups (job, geographical, race/ethnic, etc.), tradition, special terms of union contract, personal power and influence, etc.? Should membership be voluntary, elected, or required? Who decides size and membership of the group?

These are all questions that must be considered when forming a task group. There are really no hard and fast rules to help in these decisions. The criteria will more often than not reflect the values, norms and style of the larger organization. However, it is important to note that a group's effectiveness is in large measure dependent upon having the appropriate knowledge and skills available to accomplish its work.

The following are offered as guidelines when forming a task group:

1. If the group being formed is a) temporary and b) working under considerable time pressure to complete c) dealing with a highly complex task that requires a high degree of interdependence and cooperation; choose people from similar backgrounds who have the requisite knowledge and skills to get the job done and provide strong, positive leadership.

A group with this profile will not have the time or leisure to deal effectively with conflicts. In this situation it's best to minimize possible sources of conflict. Ask: "Who's best qualified to do the job?"

2. If the group being formed a) will go on for some time, b) has no special time pressures and c) has a project that is not overly complex (or requires no special expertise); then, membership can be more diverse. Broader criteria can then be applied to member selection.

   This group will have considerably more time to work through process considerations. Leadership can be much more participative--shared by all group members.

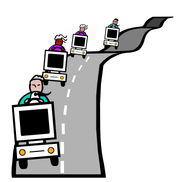
Every group, if it is to be productive, must achieve clarity and agreement about its purpose, goals, and task. The questions that follow will be useful in helping your task groups achieve goal and task agreement and ultimately direction for their work.

A. Goal Clarity

1. What are we doing? (the task)
2. Why are we doing this?
   What assumptions are we making?
3. What do we want to achieve?
4. What will the final outcome and products be?
5. How will we measure progress or success?

B. Information Needs

1. What do we need to know? About what and/or whom?
2. What do we already know?
   What information is not needed?
3. What must be found out?
4. How will we get the information?



C. Task Clarity

1. What steps must be taken to produce the product or final outcomes?
2. What is the sequence of steps?

D. Planning

1. Who does what, when, where, and how?
2. Who will be responsible for each action? When, where, how, to whom?
3. Do we have the expertise, time and money we need to accomplish the work?

E. Action (Implement the Plan)

1. Who does what, when, where, and how?
2. Who will be responsible for each action?
3. Do we have the expertise, time and money we need to accomplish the work?

F. In-Progress Review (Process Evaluation)

1. How are we doing?
   Are there problems with the plan?
   Do we have the resources necessary to carry out the plan?
   What adjustments are required?
2. How are we working together?

G. Review (Evaluation of Outcome)

1. Did we finish the job? On time?
   With available resources?
2. Did we do what we said we wanted to do?
3. What worked? What didn't work?
4. How can we improve?

These questions must be answered if the group is to have direction. Fuzzy goals and ill-defined tasks are virtually certain to produce little productive work and low morale.

Another major consideration is the importance of the group's goals to the organization. If no one really cares about the group's work beyond the group itself, the group is likely to suffer pressure from shortages in resources and other interruptions to its activities.

GROUP PROCESS CONSIDERATIONS

Other factors are also important considerations in how effectively the group will work together. Consider some of these:

- The emotional climate resulting from the interactions between members
- How the work is divided
- How decisions are made
- The emotional climate resulting from the interactions between members
- The group's norms for sharing information and listening to other members
- How conflict is handled
- How leadership is expressed

The group’s external environment may dictate how some of these factors are handled (e.g., values of the program may *support* suppression of feelings and conflicts or information may be shared very selectively. But more often these issues are settled within the group. Some groups will work out procedures or ground rules quite easily through deliberate discussion. Other groups may never deal with these concerns openly for several possible reasons:

- They are not allowed to.
- They are not aware that they can or should.
- They do not consider the issues important or legitimate.

If a group does not pay attention to its process from the first, it may spend valuable time in some conflict—which is not productive. The group's leader is the key to helping group members legitimize and come to decisions about how they will work together.

Following is a practical guide for convening and working with a design team. You will see how the membership, purpose, goals and task requirement, and process considerations are addressed for this type of work group.

DESIGN TEAMS: A WORK GUIDE

Training development is a major project that calls for skillful planning and management. This section describes a process for working with program development task forces or design teams. Also, you might find some of the included tools helpful in developing and keeping track of the project budget, schedule, and personnel/staff requirements. These tools will be particularly useful for your manager and/or a final report on the project. Also, the tools can help you to be more precise in establishing the actual resource requirements for your project and in projecting and keeping track of task completion.

Use of teams to design training sessions/curricula is very common in legal services. Usually these teams are selected by the person responsible for the event. Members typically include skilled designers, experienced trainers, content area specialists, and representatives from the delivery team. Other people who have a clear contribution to make are often included as well. Team size may range from 3-5 members to 10-12 members, according to the situation. Certainly a larger team is harder to administer, but it also offers more resources.

Invitations to the team members usually include this information:

1. An explanation of the project
2. Some idea of why the invitee is important to the team
3. An estimate of the total time investment involved—in meetings, subcommittee work, and individual work

4. The time frame—how long the team will function, how often it will meet etc.

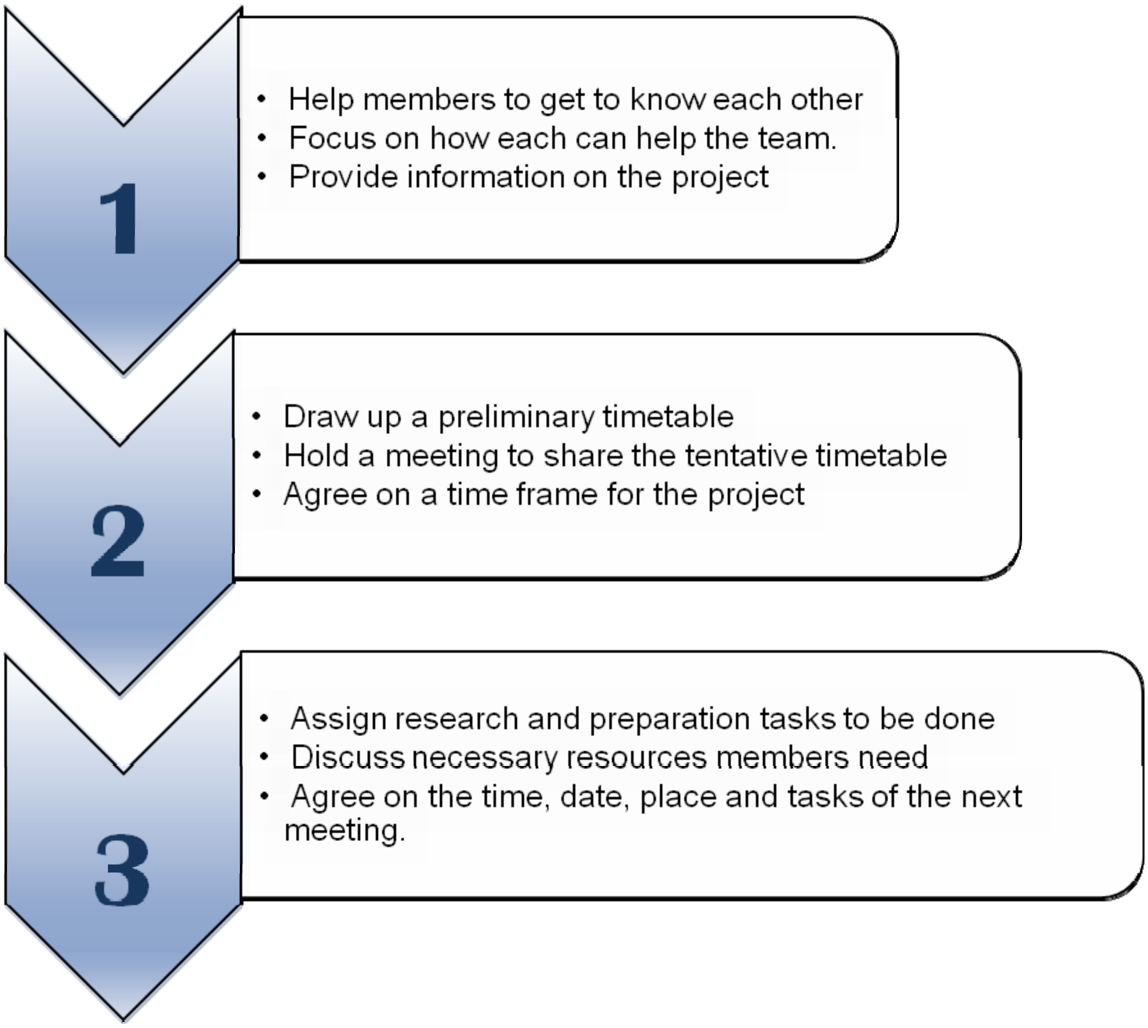
5. A description of what tasks the invitee should expect to do if he/she joins the team

6. Some explanation of the support which committee members can expect

7. Thanks for/recognition of the commitment to join the team.

Once the team has been assembled, the convener usually calls an initial meeting. The agenda and an explanatory memo will be circulated **in advance**, and the meeting is often a brief one. At this initial session, the tasks are limited.

The meeting goals might simply be these:


1
• Help members to get to know each other
• Focus on how each can help the team.
• Provide information on the project
2
• Draw up a preliminary timetable
• Hold a meeting to share the tentative timetable
• Agree on a time frame for the project
3
• Assign research and preparation tasks to be done
• Discuss necessary resources members need
• Agree on the time, date, place and tasks of the next meeting.

Given *these* goals, the agenda might look like the one that follows.

DESIGN TEAM AGENDA – FIRST MEETING
AUGUST 2, 2010

TIME	RESPONSIBILITY	ACTIVITY
12:30 – 1:00	Team members introduce themselves, focusing on resources they have to offer (skills, experience, interests, etc.) Each person should have x min. each.	Team Members
1:00 – 1:30	Presentation: Outline of project with tasks, deadlines, overall timetable	Convener
1:30 – 2:00	Questions/answers/discussion	Team
2:00 – 2:15	BREAK	
2:15 – 2:35	Brainstorm the available resources, materials, etc., which may help the team to accomplish tasks.	Convener Team
2:35 – 3:00	Discussion and culling brainstorm items into resource list	Team
3:00 – 3:30	Assigning research tasks (items on resources list)	Team
3:30 – 3:45	Planning for next meeting: time, date, place, key agenda items. Review team's assignments	Team
3:34 – 4:00	Brief discussion of how the meeting went—perhaps using a short evaluation/feedback form to start discussion	Team

In a multi-day meeting, this type of agenda could be done the first afternoon, with members doing some preparation in advance and during that evening.

During the interval between the first and second meetings, the convener or a group member:

1) circulates the meeting notes, including **reminders** to all group members of the responsibilities they agreed to and the details of the next meeting;
2) telephones/emails team members with the key tasks to offer support and keep them on target.

Most likely, the second meeting will be a full-day work session (or, depending on the task and the situation, it might be a couple of work days). Its goals would be far more task-oriented than those of the first meeting.

GOALS

brief team members on research and other tasks done since the last meeting

draft the macro-design of the actual session

outline important aspects of the micro-design for the session

discuss and assign responsibility to team members to complete micro-design, develop materials (participant materials, trainers notes, detailed schedule) for sections of the macro-design.

agree on deadlines for drafts, revisions, final copy, production, additional meetings (if needed).

Also, depending on whether the group is meeting for several days or is breaking up or to do work at the office, the team may want an additional goal to develop detailed micro-design and materials for each part of the curriculum.

People responsible for convening this type of work group should consider several techniques and tips for moving this meeting along:

- Ask team members to bring multiple copies of their report and, if feasible, of any materials they have identified.

- A draft macro-design drawn on highly visible

- Copies of the list of major tasks to be done as well as any non-flexible deadlines (e.g. if using a printer which requires advance time to be printed) should be available as a working preliminary schedule

- For team members with little or no previous design experience, a reference handout explaining the key components of macro and micro design will be necessary.

By the end of this second session, there should be a clear and final workplan which shows who's doing what and by what time frame. Have the workplan on computer and circulated by e-mail or printed copy right away. If subcommittees of the design team plan to meet to work on session plans, they should also set meeting dates and plans **before** they leave the work session.

Then begins the lonely time for the convener. Torn between reluctance to be a nag and a justified concern that the tasks may slip behind schedule, the convener must keep the project on track. Telephone and e-mail reminders and offers of support are important during this period.

If all goes well (usually, the workplans allow for just enough slippage so that things CAN come out fine in the end), drafts will come in on time, revisions, editing and final copy are processed and to the printer, and the materials are produced. It is at this point that the design team's work is done.

To thank a design team for a job well done, a convener would ideally send out not only just a warm thanks, but also a copy of the finished product! The phase of closing out such a team is an important one. Members have often hustled quite a bit to meet deadlines and cope with unexpected tasks and, realistically, you may need to call on them again; so thanks and closure shouldn't slip through the cracks.

The model on the following pages summarizes the process we've described above. It attempts to chart the differing roles of convener and team members through this work.

RESPONSIBILITIES OF DESIGN TEAM

PROJECT LEADER

- Identifies, invites team members
- Plans initial meeting; emails team
- Chairs initial team meeting

TEAM MEMBERS

- Accept invitation. Commit to membership
- Hold time available for meeting
- Do initial preparation, if required
- Participate in initial meeting

FIRST MEETING

- Introductions; members as resources
- Information on purpose and goals
- Identify available resources, materials, and options
- Assign research, other preparation and work responsibilities
- Plan second meeting
- Evaluation and discuss first meeting
- Conform assignments and next meeting date.

- Writes and circulates meeting notes
- Drafts initial workplan and schedule
- Contacts members to support them and remind them of the schedule
- Send reminder of second meeting that includes the agenda
- Prepares for meeting
- Chairs the meeting

- Do research
- Do other agreed upon tasks
- E-mail or prepare multiple copies of the materials to date
- Plan to have time available for the meetings
- Prepare for the meeting
- Participate in the meeting discussion

SECOND MEETING

- Reports on work done to date
- Draft and finalize macro design
- Outline key aspects of micro design
- Assign responsibilities to complete micro design and materials for each session
- Agree on deadlines and finalize work plan
- Set up sub-committee meetings, if needed
- Evaluate and discuss second meeting

PROJECT LEADER ↔ TEAM MEMBERS

PROJECT LEADER

- Circulates workplan
- Keeps on top of deadlines
- E-mails/phones reminders and support
- Complies first drafts
- Circulates first drafts for revisions
- Compiles revisions into final draft
- Oversees production of final copy
- Prints and copies from computer or uses a printer
- Checks and approves copy
- Send out thank-you messages or notes
- Sends approved copy to team members.

TEAM MEMBERS

- Subcommittees meet to work
- Send first drafts to project leader and/or convener
- Review and make revisions
- Receives thanks

The following charts are management tools which you may find helpful to establish and keep track of the tasks and timelines, work assignments, and budget for your group project. Each has been filled in as an example. The three blank charts can be reproduced.

TOOL 1: TASK COMPLETION TIMETABLE

The first step will be to set up a timetable for completion of the tasks. The project starts on the first of April, and the report is due the 26th. The tasks are listed in sequence, identifying beginning and ending times.

A P R I L

Tasks \ Time	1	2	5	6	7	8	9	12	13	14	15	16	19	20	21	22	23	26
1. Complete formats																		
2. Complete analysis form																		
3. Provide training																		
4. Collect date																		
5. Transfer data																		
6. Analyze, interpret																		
7. Prepare report																		
8. Deliver report																		

TOOL 2: WORK RESPONSIBILITY

Another tool is a chart for estimating the personnel requirements for each task, broken down by the type of skill and the numbers of workdays.

TASKS	DUE BY DAY	ESTIMATE OF PERSON-DAYS REQUIRED			TOTAL
		Asst. Director	Aide	Sec'y	
1. Complete data collection format	3	1		1	2
2. Complete analysis formula	5	1		½	1 ½
3. Provide training	6	½	½		1
4. Collect data	14		5		5
5. Transfer data to computer	15	½			½
6. Analyze and interpret	16	½			½
7. Prepare report	18	1		½	1 ½
8. Deliver report/send by a-mail	18	¼			¼
TOTALS		4 3/4	5 ½	2	12 ¼

WORK RESPONSIBILITY CHART

TASKS	DUE BY DAY	ESTIMATE OF PERSON-DAYS	TOTAL

BUDGET FORM

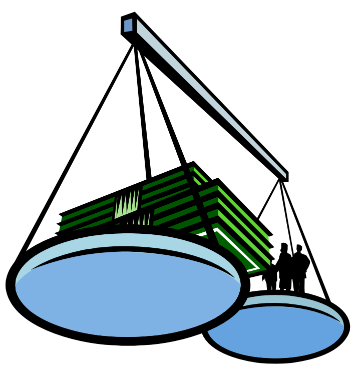
ITEM	COST	DESCRIPTION
Direct labor costs		
Consultants		
Supplies/Materials		
Equipment		
Facilities/Space		
Postage		
Reproduction		
Telephone		
Travel		
Per Diem		
Miscellaneous		
Other		
TOTAL		

LABOR COSTS

Direct labor costs $ Cost ________ x Time ________ = ________

After the Work Responsibility Chart is completed, the labor costs can be calculated, given the daily rates below:

Secretary	at	\$176/day x 2 days = \$352
Assistant	at	\$224/day x 5½ days = \$1,232
Asst. Director	at	\$328/day x 4 ¾ days = \$1,558
Total		\$3,142



TOOL 3 BUDGET FORM

ITEM	COST	DESCRIPTION
Direct labor costs	$3,142	Assistant Director , Secretary, and Aide
Consultants		
Supplies/Materials	$165	Paper for analysis, documents, and report and other materials
Equipment		
Facilities/Space		
Postage		
Reproduction	$38	Printer supplies
Telephone		
Travel		
Per Diem		
Miscellaneous	$100	Contingency
Other		
Other		
TOTAL	$3,445	

PLANNING AND CONDUCTING MORE EFFECTIVE MEETINGS

The skills of planning and conducting more effective meetings will be critical ingredients in your success as a TRP. The characteristics and key components of an effective meeting are outlined below. These are critical to effective and efficient meetings, as well as the project's success. Be sure to implement them—and train group members to use them.

CHARACTERISTICS OF AN EFFECTIVE MEETING

1. The group leader prepares and distributes a clear agenda/purpose before the meeting. At times, group members have the purpose but prepare the agenda during the first 15 minutes of the meeting.
2. The group discusses and clarifies the desired outcome of the meeting. Everyone knows what success will look like at the end of the meeting.
3. The meeting accomplishes what it sets out to do.
4. Everyone understands the outcomes. They make a clear decision about who will record critical information (e.g., decisions, plans, etc. and distribute it.
5. Group members participate actively. Each member feels confident about the contribution he or she can make to the work of the group.
6. Everyone understands and agrees with the formal leadership parameters.
7. The emotional and physical environment is appropriate to the purpose and goals of the meeting.
8. Everyone takes responsibility for the success or failure of the meeting, not just the formal group leader.

KEY COMPONENTS OF AN EFFECTIVE MEETING

1. The group leader has prepared and sent out a clear purpose statement and/or agenda before the meeting. At times, the group may need to prepare the agenda during the first 15 minutes of the meeting.

2. The group observes the stated time limits and the meeting starts and ends <u>on time</u>.

3. Rules are clear, non-ambiguous, and well-defined.

4. Everyone discusses and agrees to the processes and procedures for accomplishing tasks and working together.

5. The group will maintain an appropriate balance between attention to task and interpersonal process.

6. The group members determine a clear recording process.

7. Meeting minutes effectively state meeting outcomes, decisions, and recommendations.

8. Everyone has agreed on the criteria for decision-making, with the limitations clearly defined.

9. The meeting space is comfortable and well-organized. The space is equipped with a means to show elements of the on-going discussion (flip chart or computer projector).

10. The management/chairperson style and attitude are open-minded, which encourages an open discussion about the planning and decision-making.

11. There is clear post-meeting accountability. Specific individuals implement the decisions within the agreed-upon time limits.

Following are a few articles to increase your knowledge of factors to consider in planning and conducting meetings. Read them for techniques, hints, and aids for making your meetings more effective. Readings are organized into these categories:

- Planning for meetings
- Leading meetings
- Group dynamics in meetings
- Tools to help meetings be effective

Before you look at the readings, you might take a few minutes to reflect on the meetings you have led or participated in. Answers to the questions on the Meeting Assessment Scale provide you with an assessment of the effectiveness of your meetings in several categories such as structure, problem-solving, and openness, and follow-through. Decide on responding either on a regular meeting or a composite of meetings you lead/attend.

MEETING ASSESSMENT SCALE

With a specific work group in mind, how often are the following behaviors exhibited during its meetings?	Rarely or Never	Just once in a while	Fairly often	Usually, if not always
STRUCTURE				
1. The group skips from subject to subject.				
2. Members of the group raise Concerns and questions that are off the subject.				
3. Members know *during* the meeting where the topic under discussion is on the agenda.				
4. Group members feel overwhelmed by too much information.				
5. Members come to the meeting knowing the purpose and/or the agenda.				
6. Group members come and go at will during the meeting.				
7. The rules for conducting the meeting are clear.				
8. Discussion seems to go on end-lessly.				

With a specific work group in mind, how often are the following behaviors exhibited during its meetings?	Rarely or Never	Just once in a while	Fairly often	Usually, if not always
INFLUENCE				
9. Decisions or chosen solutions are the boss wants, rather than what the group *really* wants.				
10. Participation by group members is encouraged.				
11. The boss “power plays” or rams decisions through,				
12. Most group members participate in the discussion.				
13. Some people have ideas or concerns that never get on the agenda.				
14. All sides of an issue get aired.				
15. The same few members tend to monopolize the discussion.				
PROBLEM-SOLVING				
16. The group divides or stalemates to monopolize discussion.				
17. The group proposes solutions before thoroughly airing the problem and its possible causes.				

With a specific work group in mind, how often are the following behaviors exhibited during its meetings?	Rarely or Never	Just once in a while	Fairly often	Usually, if not always
PROBLEM-SOLVING Con't				
18. The group proposed solutions before thoroughly airing the problem and its possible causes.				
19. The same problems occur repeatedly over the span of several meetings.				
20. The group considers several ideas before a decision is reached.				
21. The group cannot agree on what the real issue or problem under consid-eration is.				
OPENNESS				
22. Members tell the boss what he/she wants to hear.				
23. The group members are willing to express their true feelings about problems or issues.				
24. Members are subject to personal attack.				
25. Members are open and willing to be critical—in a positive way.				
26. The group members feel comfortable in working with each other.				

With a specific work group in mind, how often are the following behaviors exhibited during its meetings?	Rarely or Never	once in a while	Fairly often	Usually, if not always
FOLLOW-THROUGH				
27. There is confusion about who is going to make the decision or have the final say.				
28. The leader and group make certain that appropriate action is taken after a decision is reached.				
29. There is confusion after the meeting as to task assignments and what is to be done.				
30. The records/minutes of the meeting are available before the next meeting.				

On the next page, you will find the model for scoring the Assessment Scale, as well as the interpretation of the scores—what they mean.

SCORING THE MEETING ASSESSMENT SCALE

Circle the score in the category you have checked for each item. Then total the numbers you have circled. Record sub-totals and the GRAND TOTAL.

	Rarely or Never	Just once in a while	Fairly often	Usually, if not always	
STRUCTURE					
# 1	3	1	1	0	
# 2	3	1	1	0	
# 3	0	2	2	3	
# 4	3	2	1	0	
# 5	0	1	2	3	
# 6	3	2	1	0	
# 7	0	1	2	3	
# 8	3	2	1	0	Sub-total
INFLUENCE					
# 9	3	2	1	0	
# 10	0	1	2	3	
# 11	3	2	1	0	
# 12	0	1	2	3	
# 13	3	2	1	0	
# 14	0	1	2	3	
# 15	3	2	1	0	Sub-total
PROBLEM-SOLVING					
# 16	3	2	1	0	
# 17	3	2	1	0	
# 18	3	2	1	0	
# 19	0	1	2	3	
# 20	3	2	1	0	
# 21	3	2	1	0	Sub-total
OPENNESS					
# 22	3	2	1	0	
# 23	0	1	2	3	
# 24	3	2	1	0	
# 25	3	2	1	0	
# 26	0	1	2	0	Sub-total
FOLLOW-THROUGH					
# 27	3	2	1	0	
# 28	0	1	2	3	
# 29	3	2	1	0	
# 30	0	1	2	0	Sub-total

GRAND TOTAL ___________

INTERPRETING THE MEETING ASSESSMENT SCALE SCORES

If your STRUCTURE sub-total is:	Your meetings tend to be:
22+	Organized on on-target
15 -- 21	Somewhat organized but off the mark
8 -- 14	Somewhat unorganized and disjointed
0 -- 7	Out-of-control

If your INFLUENCE sub-total is:	Influence in decision-making tends to be:
19+	Shared
13 -- 18	Shared more than dominated
7 -- 12	Dominated more than shared
0 -- 6	Dominated

If the PROBLEM SOLVING sub-total is:	Problem-solving at meetings tends to be:
16+	Good to excellent
11 – 15	Adequate
8 – 10	Less than adequate
0 – 5	Poor

If your OPENNESS sub-total is:	The climate of your meetings tends to be:
13+	Open and trusting
9 – 12	More open than closed
5 – 8	More closed than open
0 – 4	Closed and untrusting

If FOLLOW-THROUGH sub-total is:	Your meetings tend to contributed toward:
10+	Getting the job done
7 – 9	Getting the job done – eventually
4 – 6	Getting the job done – sometimes
0 – 3	Getting almost nothing done.

IF YOUR GRAND TOTAL score is:	Your meetings tend to be:
76+	Effective
51 – 75	More effective than ineffective
26 – 50	More ineffective than effective
0 – 25	Ineffective

PLANNING FOR MEETINGS

An early step in designing a meeting is to determine the purpose and type of session you want to have. A meeting to share reports on completed training events will be run very differently from one which aims to map out the high priority training plans for the coming year. Thus, David Nicholl's article (below) may help to sort out the various types of meetings you may be running.

The Lippitt and Schindler-Rainman article on "Designing Participatory Meetings is a very practical planning system for meetings in which you hope for a high level of participant involvement. Since many meetings run by training-responsible people focus on design work, sharing ideas, setting priorities, and other group-oriented ideas, this source may be very useful.

MEETING MANAGEMENT

David R. Nicoll

A conservative estimate would indicate that most of us who work spend four hours per week attending meetings. At this rate, each us can anticipate sitting through more than eight thousand hours of meetings in a lifetime of work. This time is valuable, both to us and to our organizations. A productive meeting of fifteen top managers can cost an organization from one thousand to several thousand dollars per hour; an unproductive meeting during which problems are not solved and intelligent decisions are not made can cost much more.

Most of us have learned how to run meetings by osmosis -- by watching another person, who, in turn, learned by watching someone else. This method of learning would be valid if the observed processes worked. But what is usually learned is a weak version of Roberts' Rules of Order, which may have worked for the House of Lords in the nineteenth century but is grossly inadequate for twentieth century meetings.

Fortunately, behavioral scientists have developed various methods for running meetings that work for thousands of individuals in all kinds of organizations across the country. The purpose of this piece is to convey a few of the concepts that have been developed and a number of suggestions that will help foster the effective management of meetings.

TYPES OF MEETINGS

In productive organizations, meetings are of distinctive types. All meetings have specific purposes for being held and specific tasks to be performed by the participants. These meetings are effective only when the participants clearly understand the type of meeting they are holding and then make sure they accomplish the tasks associated with that type of meeting. The different types of meetings conducted in organizations are as follows:

Informational:

The purpose of this type of meeting is to disseminate data and facts as well as decisions and policies made by people or groups in the organization senior to those holding the meeting. Three subtypes of informational meetings exist:

- from supervisor to subordinates, in which the former conveys information;
- from subordinates to supervisor, in which the subordinates convey information; and
- interactional, in which the supervisor and subordinates share information.

Validational:

This type of meeting is held to announce a previously made decision to the employees affected so that the supervisor can obtain their assent to the decision's implementation. The desired outcome of a validational meeting is the participants' agreement of the wisdom, appropriateness, or logic of the decision. The informational flow here is primarily from top to bottom.

Planning/Strategizing:

The purpose of the planning/strategizing meeting is the generation of long-range (one- to ten-year) action plans for the work group in attendance. Involved is an effort to define how the group would like to see its future evolve. Often the outcome of such a meeting is a description of both an ideal state and the sequence of action needed to achieve it. The conversational flow is generally from peer to peer.

Problem-Solving/Decision Making:

The objective of this type of meeting is also the generation of action plans, but the time factor considered is short (one day to six months), and the focus is on day-to-day business rather than on long-range planning. The conversational flow is from peer to peer or interactional.

Staff Conferences:
This type of meeting is held to ensure the progress of action plans generated in planning and problem-solving meetings. Progress reports are provided, a full expression of opinions is solicited, and coordination of disparate actions is achieved. The flow of conversation is from peer to peer and interactional.

Feedback/Evaluation:
The purpose of the feedback/evaluation meeting is to assess progress in accordance with the schedules set forth in previous planning and/or problem-solving meetings. Organizational and/or personal performance is the focus. The informational flow is often from supervisor to subordinates, occasionally from peer to peer. Generally, it should be from implementing subordinates to supervisor.

Training:
This type of meeting is held to educate the staff. The goal is to expand the knowledge, improve the skill, or change the behavior attitudes of the participants so that they will perform in their jobs more effectively. The informational flow is downward and interactional.

Celebrational:
The celebrational meeting is held so that participants can enjoy being together, relax, and have a good time. The conversational flow is in all directions.

For each type of meeting the chart on page 35 lists the kinds of tasks to be performed and those who should perform them.

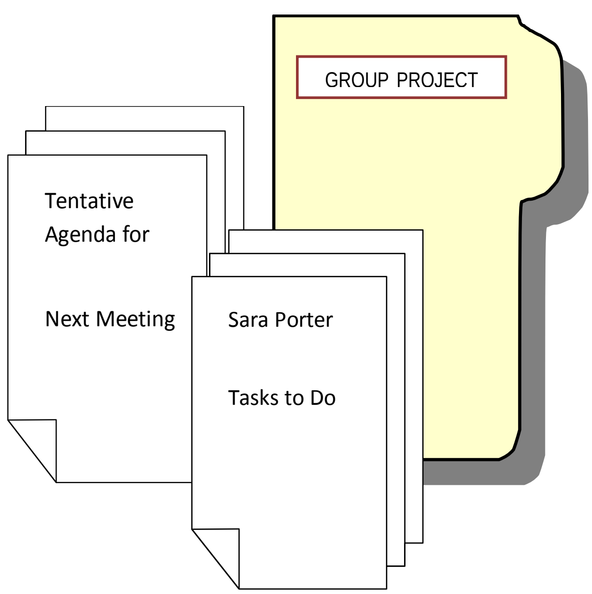
CONVENER/MANAGER RESPONSIBILITIES
The meeting convener or manager has two primary responsibilities. The first is to declare the type of meeting being held. Ideally, this announcement is made before the meeting is convened and is repeated at the start of the meeting to focus the participants on the objectives. The second convener responsibility is to declare his or her function in the meeting and that of the participants as well. The choices of function are limited to decision maker, participant, resource expert, facilitator, and data recorder. It is important for all concerned to know what parts they are to play, and unfortunately these parts are not always obvious.

The concept of “pacing cues: suggests that every successful meeting, regardless of type, has a definite and distinctive pace. It follows, then, that each type of meeting also has cues or signals governing movement toward a satisfactory conclusion. The distinct phases of a meeting as follows:

- Definition of the task
- Applications of energy to the tasks
- Consolidation, and
- Closure

These kinds of cues signal that a meeting is ready to move from one phase to another:

- Quick repetitions of the same points by different people
- Successive lulls in the dialog
- A feeling of confusion on the participants’ part, often vocalized in using questions such as “What are we doing now?”



TASKS TO BE COMPLETED IN MEETINGS

MEETING TYPE	TASKS	TASK PERFORMER
Informational	Disseminating information	Information holder
	Listening	Participants
	Questioning for clarification	Participants
Validational	Disseminating decisions	Decision maker—or a representative of him/her
	Listening	Participants
	Presenting action assignments	Supervisor
	Assenting/dissenting	Participants
Planning/Strategizing	Identifying the problem/issue	Decision maker
	Developing data	Participants
Problem Solving	Generating alternatives	Participants
Decision Making	Selecting a solution	Decision maker
	Planning action	Participants
	Presenting action assignments	Supervisor
Staff Conference	Developing data	Participants
	Identifying progress	Decision maker/participants
	Identifying the probem/issue	Decision make
	Generating alternatives	Participants
	Selecting and planning a course of action	Decision maker
	Presenting action assignments	Supervisor

Feedback/Evaluation	Developing data	Participants
	Identifying the problem/issue	Decision maker
	Generating alternatives	Participants
	Planning action	Decision Maker
	Presenting action assignments	Participants
Training	Presenting the concept	Trainer
	Listening	Participants
	Experimenting	Participants
Celebrational	(As appropriate)	Participants

Another cue worth noting is the tempo of successful meetings. Each meeting type is listed below along with its characteristic pace.

Meeting Type	**Pace**
Informational	Crisp, quick
Validational	Episodic (ebb and flow)
Planning/Strategizing	Slow/deliberate
Problem Solving/Decision Making	Meandering
Staff Conference	Repetitive (long, then short cycles)
Feedback/Evaluation	Slow, contemplative
Training	Smooth, flowing
Celebrational	Rambling

MEETING MANAGEMENT CHECKLIST

ADVANCE PREPARATION

1. Set the agenda and email/post a meeting notice.
   a. Designate the meeting topic.
   b. Designate the meeting type and the attendees.
   c. Specify expectations.
      ✓ Set the activity-level standards.
      ✓ Decide on the participants' responsibility regarding functional role.
      ✓ Identify resource people.
2. Assign any necessary prework.
3. Establish and secure a base of information.
4. Make the logistic arrangements.
   a. Space
   b. Time
   c. Seating
   d. Materials (Flipchart, pads of paper, folders, computer projector etc.)

MEETING DYNAMICS

1. Opening Phase--Defining the Task
   a. Convene the meeting.
   b. Introduce the participants (if necessary).
   c. Reinforce/change expectations.
   d. Reinforce participation and norms of representation.
   e. Introduce the resource experts.
   f. Identify the problems/issues that will *not* be dealt with during the meeting.
   g. Present the time schedule.

2. Middle Phases—Application of Energy and Consolidation

   a. Test issue formation and understanding.
   b. Reiterate the decisions that are made.
   c. Monitor pace.

3. Closing Phase

   a. Evaluate the progress that has been made.
   b. Assign tasks.
   c. Establish a means for dealing with unfinished business—put in the next agenda.

4. Follow-up Documents to be Produced

   a. Minutes
   b. Action-plan summaries
   c. Individual action-assignment sheets
   d. Action-review reminders
   e. Completion reminders
   f. Appreciation/recognition notes

Pacing cues should be used as indicators as to whether the meeting is moving roward a successful consludion. The meeting manager should monitor the tempo of the meeting and alter the pace when necessary.

CONCLUSION

Meetings are microcosmic organizations, and as such they should be structured and designed carefully. The check list above produces a means by which the meeting manager can plan and execute a well-designed, properly structured meeting.

DESIGNING PARTICIPATORY MEETINGS

Eva Schindler-Rainman and Ronald Lippitt

You might be feeling at this point that this business of designing or planning meetings is a bit burdensome, with all the things there are to think about. Actually, this resource book should make the job of planning and leading a lot simpler and help prevent a wide variety of time wasting traps and errors in the leadership and planning of meetings.

Now let's turn to the actual planning of the design and flow of a session or sessions. We are providing three guide sheet tools, with suggestions about the success of planning, during which the meeting checklists will be useful.

SEVERAL BELIEFS ABOUT PLANNING

1. Our first belief is that anyone with leadership or teaching responsibility for any type of meeting has the job of planning carefully for that event rather than "playing it by ear." Time is precious and groups need a renewal of faith that a productive experience and outcome is possible, and that an orderly, thoughtful process of involvement and collaboration can result from a good planning job.

2. Our second belief is that the anticipated participant-members of the meeting or conference or workshop or class must be represented in whatever way is feasible in defining the desired outcomes of the meeting. This may be by questionnaire, or meeting with the program committee, or telephone interviews with a sample, or any other way of eliciting needs, interests, priorities, and expectations ahead of time from participants. If none of this can be done beforehand, a census of needs and expectations can be taken at the beginning of the meeting itself.

3. Our third belief is that the plan for the meeting must provide the kinds of opportunities for every person to participate which will motivate their involvement and elicit and utilize their personal resources, skills and ideas.

4. And, fourth, the design must make provision for getting feedback from the participants about their feelings of satisfaction, productivity or frustrations, as well as ideas for improvement, so that the process can be revised during the meeting and participants can experience their influence in guiding the process.

5. Follow up must be part of the planning process, including who will do what and when it will be done.

Using these beliefs as a foundation, we have developed three specific planning tools and some steps for using them.

THE THREE STEPS OF PLANNING FOR A MEETING

Assuming that a decision has been made that there is reason for a meeting the first step to think of is Pre-Design Preparation. Before we can think about questions of timing and the flow of the meeting or course or conference, we must mobilize the best thinking we can about three questions. The outline for doing this is presented in Planning Sheet 1 (see page 4-46). As you see, the three questions are:

1. What can we summarize as information about the needs, interests, expectations of the participants and the individual differences among them?

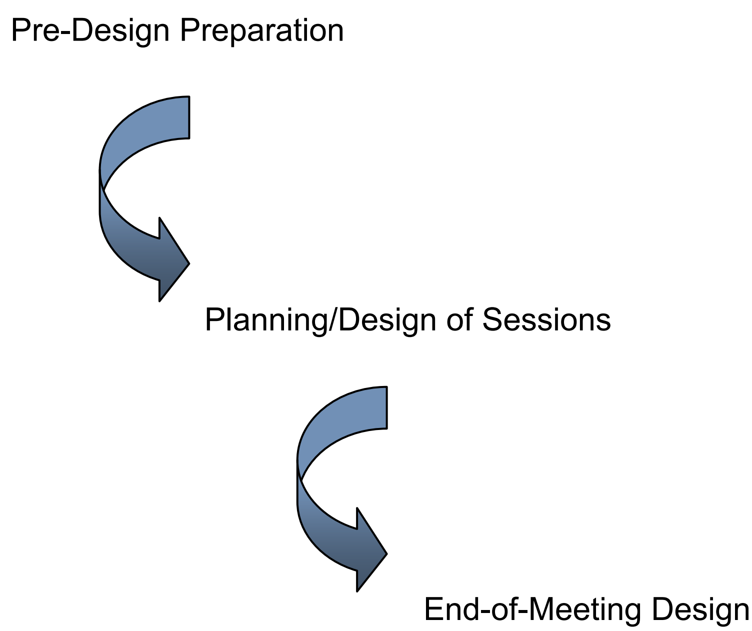
2. What are the possible purposes/outcomes of the meeting that would actualize the needs and expectations of the participants and the planners?

3. What are possible activities, materials, human resources, and agenda items that would facilitate the achieving of the priority outcomes?

In our work with planning groups we have found it particularly helpful to brainstorm on questions 2 and 3 to get out all the ideas for focusing on the questions of outcomes and ingredients and then to assign priorities. This brainstorming can be done by the planning group and/or by the planners and a few participants, or if need be at the first meeting of the group.

The second planning step is the actual design for the meeting or sequence of sessions. Planning Sheet 2 provides a format to help you with this. You will note that at the top, this page helps to summarize, for the decisions of the first planning sheet, the desired goals or outcomes which you have settled on. The rest of the page is for the plan of the startup period from the time the first participant walks through the door, and for estimating the timing and flow of the meeting with the divisions of responsibility for leadership, the groupings' needed materials, resources, and space arrangements in the room.

The third step, Planning Sheet No.3, facilitates the planning of how you want the meeting to end--announcements, commitments, follow-up phases, etc. and what follow-up activities are part of the design to insure the outcome and continuities you have as priorities. This after-the-meeting part of the design is a critical determiner of whether the time and energy of the meeting is worthwhile.



Planning Sheet 1

Diagnostic Planning for Designing Participatory Meetings

Thinking about the participants or members (e.g., how many, sub-groups and individual differences, needs, readiness, interests)	Some desirable outcomes of the meeting (e.g., skills information, values, concept, actions, plans, recommendations, decisions)	Ideas for activities, experiences, resources to facilitate the outcomes (e.g., exercises projects, resources, facilities, work groups)
✳Star most important chacteristics and differences among the participants to keep in mind in designing.	✳Star the highest priority outcomes.	✳Star what seems to be the most appropriate, effective, feasible ingredients of design.

Planning Sheet 2

The Meeting Design: Timing, Flow, Assignment, Arrangements

Desired Outcomes or Goals:

Time Estimate	Activities, Methods, Groupings	Who Responsible	Arrangements of space, equipment, materials
	Pre-Meeting and Start-up of the meeting		
	Flow of Session after Start-up Activities		

(Continue on additional sheets as needed)

Planning Sheet 3

Commitments, Follow-ups, Supports

1. Plans for ending the meeting (e.g., closing activities, evaluation, reports of back home plans, dealing commitments, etc.)

2. Follow-up Actions Who? Will do what? When? Where? (e.g., often a directory of names, addresses, telephone numbers, e-mail addresses, is very important at this point—and getting any follow-up dates recorded in everyone's calendar)

3. Cleanup and Other Immediate Commitments (e.g., what has to be returned, thank-you calls, bills paid, etc.)

LEADING MEETINGS

Leland Bradford's book, *Making Meetings Work*, includes a helpful chapter still relevant today that contrasts traditional leader-centered meetings with group-centered ones. As many legal services meetings are leader-dominated, you may find this chapter a particularly helpful version of alternatives. Read it with the expectation that greater awareness of group dynamics would help staff use meeting time more effectively.

Another approach to the issue of leadership is problem-centered. In their book, *Taking Your Meetings Out of the Doldrums*, Eva Schindler-Rainman and Ronald Lippitt describe specific techniques to use when difficult situations arise. A summary is reproduced here which appeared in *Training Magazine*.

35 WAYS TO KEEP THE LID ON 5 TYPICAL PROBLEMS

Eva Schindler-Rainman and Ronald Lippitt

Certain problem situations occur again and again during training meetings and continue to frustrate even veteran trainers. For example, the long-winded speaker-- How do you cut him or her off? What should you do about late comers?

For solutions to these and several other common meeting problems, TRAINING turned to Ronald Lippitt and Eva Schindler-Rainman.

How do you cut off a long-winded speaker?

Suggest ahead of time that the speaker stop once or twice during the speech to give listeners a chance to ask questions or make comments.

Advise the speaker beforehand that you will give a time warning of so many minutes before time is up.

Stand up at a given time.

Sit next to the speaker so you can give a "touch signal."

Have a timekeeper in the group stand up at an agreed-on time.

Make it clear to the speaker—ahead of time—how long a speech the group is expecting.

Tell the group something like: "So-and So will speak approximately 20 minutes, after which you'll be able to ask questions."

An important guest speaker is going to attend the next meeting. What are some ways to make the group feel at ease with this person?

Have a coffee hour at the beginning of the meeting where people can meet the visitor informally.

Introduce the visitor early in the meeting, so there is no time for anxiety or awkward curiosity.

Arrange the seating so that the guest speaker is not necessarily at the head table, if there are several tables. In order to meet a variety of people, the guest might sit at different tables during the course of the meeting.

The guest speaker could be prepared to walk around and meet people during the breaks.

On the agenda, give the visitor time to ask questions of the group and demonstrate an interest in them.

Ask the guest speaker what he/she would like to do to establish rapport with the group.

You've heard the meeting chair say, "Gosh, what do I do with that group? You ask them a question, but they don't respond. They're so apathetic." So, how do you generate participation?

Divide into partners, buzz groups or table groups to discuss the issue at hand, and then have each group submit questions to the meeting leadership.

Ask for a brainstorming session in which everybody stimulates each other by calling out ideas.

Divide the group into smaller groups of 2 or 3 and have each subgroup offer ways they believe the group would participate more.

Distribute a discussion sheet about the topic to the group—or to each table.

Train some conveners to help small groups participate more actively.

One roadblock for many meetings is: Do you start at the stated time—or when people arrive?

Recognize that, even in the best of groups, all participants aren't going to walk through the door at the same time. So, plan what might be called a "ragged time beginning." In other words, make sure each person has something to do from the moment he or she comes in. For example, you can spur pre-meeting conversations by passing out topic lists. You can encourage pre-meeting reading by handing out related article reprints. Another way to keep the beginning ragged is to encourage early arrivals to interview each other.

Establish a pattern of starting on time. Let late comers catch up later.

Don't assume that meeting leaders should be responsible for reprimanding people who are late. Instead, appoint a committee of peers to work on the late-comer problem.

How do we decide which resource experts we want to speak to at meetings? And, how do we determine which speakers will be really useful?

Provide the expert with a list of problems that the group has experienced relating to that person's specialty.

By means of a brief brainstorm, determine what things members of the group hope to learn in the session with the resource person.

Arrange a personal or telephone conference among members of the group and the resource person.

Advise the resource person ahead of time that the group has some definite ideas they want to explore and that they prefer bouncing questions off this expert rather than listening to a prepare speech.

Specify clearly to the resource person the length of time he/she has, the topic to be discussed, and the hoped-for outcomes of the meeting.

What do you do when you walk into the room where a meeting is scheduled and you discover nothing is arranged as it should be?

Rearrange the room yourself.

Find the custodian and ask him/her to help you rearrange it.

Ask the meeting participants to help you “set the stage.” This is often a good ice breaker.

Check to see if there might be an empty room that would be easier to set up in a hurry.

Obviously, there is more to planning a meeting than booking a room, engaging a speaker and then publicizing the fact. Problems abound. But, as authors Lippitt and Schindler-Rainman point out, so do solutions. "To find yours, they suggest brainstorming, a lively process sure to produce a variety of answers to questions that plague both fledgling and veteran meeting planners.

GROUP DYNAMICS IN MEETINGS

An instructive guide to understanding the behavior of people in meetings is contained in Philip Hanson's "What to Look for in Groups". It addresses key components of group functioning. Phrased as questions, the guidelines could easily be modified for use by you and/or group members in diagnosing the group's effectiveness. In addition, an introductory paragraph precedes each set of questions, providing a quick education in why it's helpful to look not only at what gets done in meetings, but also how.

The second article, "Group Role Behavior," describes the roles that people assume in groups: task, maintenance and self-oriented. These roles are described in literally every major work on group functioning.

The third article, "Conditions Which Hinder Effective Communication" by William Pfeiffer presents a theoretical discussion of the many patterns and forces that make it difficult for people to work effectively in meetings. While this article does not focus on specific techniques to deal with problems of poor communications, it may help you to diagnose some of the communications blocks you've seen in meetings.

WHAT TO LOOK FOR IN GROUPS

Philip Hanson

In all human interactions there are two major ingredients--content and process. The first deals with the subject matter or the task upon which the group is working. In most interactions, the focus of attention of all persons is on the content. The second ingredient, process, is/concerned with what is happening between and to group members while the group is working. Group process, or dynamics, deals with such items as morale, feeling tone, atmosphere, influence, participation, styles of influence, leadership struggles, conflict, competition, cooperation, etc. In most interactions, very little attention is paid to process, even when it is the major cause of ineffective group action. Sensitivity to group process will better enable one to diagnose group problems early and deal with them more effectively. Since these processes are present in all groups, awareness of them will enhance a person's worth to a group and him to be a more effective group participant.

Below are some observation guidelines to help one process and analyze group behavior.

Participation

One indication of involvement is verbal participation. Look for differences in the amount of participation among group members.

Who are the verbal participators?

Who participates least?

Do you see any shift in participation, e.g., verbal members become quiet; low level members suddenly become talkative. Do you see any possible reason for this in the group's interaction?

How are the silent people treated? How is their silence interpreted? As consent? Disagreement? Disinterest? Fear? etc.

Who talks to whom? Do you see any reason for this in the group's interactions?

Who keeps the ball rolling? Why? Do you see any reason for this in the group's interaction?

Influence
Influence and participation are not the same. Some people may speak very little, yet they capture the attention of the whole group. Others may talk a lot but are generally not listened to by other members.

Which members are high in influence? That is, when they talk, others seem to listen.

Which members are low influence? Others do not listen to or follow them. Is there any shifting in influence? Who shifts?

Do you see any rivalry in the group? Is there a struggle for leadership? What effect does it have on other group members?

Styles of Influence
Influence can take many forms. It can be positive or negative; it can enlist the support or cooperation of others or alienate them. How a person attempts to influence another may be the crucial factor in determining how open or closed the other will be toward being influenced. Items 1 through 4 under this heading are suggestive of four styles that frequently emerge in groups.

Autocratic! Does anyone attempt to impose his/her will or values on other group members or try to push them to support his/her decisions? Who evaluates or passes judgment on other group members? Do any members block action when it is not moving in the direction they desire? Who pushes to “get the group organized?

Peacemaker: Who eagerly supports other group members' decisions? Does anyone consistently try to avoid conflict or unpleasant feelings from being expressed by pouring oil on the troubled waters? Is any member typically deferential toward other group members--gives them power? Do any members appear to avoid giving negative feedback, i.e., who will level only when they have positive feedback to give?

Laissez faire: Are any group members getting attention by their apparent lack of involvement in the group? Does any group member go along with group decisions without seeming commit himself one way or the other? Who seems to be withdrawn and uninvolved; who does not initiate activity, participates mechanically and only in response to another member's question?

Democratic: Does anyone try to include everyone in a group decision or discussion? Who expresses his feelings and opinions openly and directly without evaluating or judging others? Who appears to be open to feedback and criticisms from others? When feelings run high and tension mounts, which members attempt to deal with the conflict in a problem-solving way?

Decision-Making Procedures

Many kinds of decisions are made in groups without considering the effects of these decisions on other members. Some people try to impose their own decisions on the group, while others want all members to participate or share in the decisions that are made.

Does anyone make a decision and carry it out without checking with other group members? (Self-authorized) For example, he decides on the topic to be discussed and immediately begins to talk about it. What effect does this have on other group members?

Does the group drift from topic to topic? Who topic-jumps? Do you see any reason for this in the group’s interactions?

Who supports other members' suggestions or decisions? Does this support result in the two members deciding the topic or activity· for the group (handclasp)? How does this affect other group members?

Is there any evidence of a majority pushing a .decision through over other members’ objections? Do they call for a vote (majority support)?

Is there any attempt to get all members participating in a decision (consensus)? What effect does this seem to have on the group?

Does anyone make any contributions which do not receive any kind of response or recognition (plop)? What effect does this have on the member?

Task Functions

These function s illustrate behaviors that are concerned with getting the job done, or accomplishing the task that the group has before them.

Does anyone ask for or make suggestions as to the best way to proceed or to tackle a problem?

Does anyone attempt to summarize what has been covered or what has been going on in the group?

Is there any giving or asking for facts, ideas, opinions, feelings, feedback, or searching for alternatives?

Who keeps the group on target? Who prevents topic-jumping or going off on tangents?

Maintenance Functions

These functions are important to the morale of the group. They maintain good and harmonious working relationships among the members and create a group atmosphere which enables each member to contribute maximally. They insure smooth and effective teamwork within the group.

1. Who helps others get into the discussion (gate openers) ?
2. Who cuts off others or interrupts them (gate closers) ?
3. How well are members getting their ideas across? Are some members preoccupied and not listening? Are there any attempts by group members to help others clarify their ideas?
4. How are ideas rejected? How do members react when their ideas are not accepted? Do members attempt to support others when they reject their ideas?

Group Atmosphere

Something about the way a group works creates an atmosphere which in turn is revealed in a general impression. In addition, people may differ in the kind of atmosphere they like in a group. Insight can be gained into the atmosphere characteristic of a group by finding words which describe the general impressions held by group members.

1. Is there any sub-grouping? Sometimes two or three members may consistently agree and support each other or consistently disagree and oppose one another.

2. Do some people seem to be “outside” the group? Do some members seem to be “in”? How are those “outside” treated?

3. Do some members move in and out of the group, e.g., lean forward or backward in their chairs or move their chairs in and out? Under what conditions do they come in or move out?

Feelings

During any group discussion, feelings are frequently generated by the interactions between members. These feelings, however, are seldom talked about . Observers may have to make guesses based on tone of voice, facial expressions, gestures, and many other forms of nonverbal cues.

> What signs of feelings do you observe in group members: anger, irritation, frustration, warmth, affection, excitement, boredom, defensiveness, competitiveness, etc.?
>
> Do you see any attempts by group members to block the expression of feelings, particularly negative feelings? How is this done? Does anyone do this consistently?

Norms

Standards or ground rules may develop in a group that controls the behavior of its members. Norms usually express the beliefs or desires of the majority of the group members as to what behaviors should or should not take place in the group. These norms may be clear to all members (explicit), known or sensed by only a few (implicit), or operating completely below the level of awareness of any group members. Some norms facilitate group progress and some hinder it.

> Are certain areas avoided in the group (e.g., sex, religion, talk about present feelings in group, discussing the leader's behavior, etc.)? Who seems to reinforce this avoidance? How do they do it?
>
> Are group members overly nice or polite to each other? Are only positive feelings expressed? Do members agree with each other too readily? What happens when members disagree?
>
> Do you see norms operating about participation or the kinds of questions that are allowed (e.g., "If I talk, you must talk"; "If I tell my problems, you have to tell your problems")? Do members feel free to probe each other about their feelings? Do questions tend to be restricted to intellectual topics or events outside of the group?

GROUP ROLE BEHAVIOR

Edited by Bettye Harrison-Burns

The concept of role means a pattern of activity which characterizes an individual's place in a group. In a small group, it is possible to identify characteristic patterns of behavior and to relate these roles to the functioning of the group.

Behavior in the group can be perceived from the point of view of what its purpose or function seems to be. When a member says something, is he/she primarily trying to get the group task accomplished (task)? Trying to improve or patch up some relationships among members (maintenance)? Or, is he/she primarily meeting some personal need or goal without regard to the group's problems (self-oriented)?

Following is a categorizing of roles in the areas of task, maintenance, and self-oriented behavior which are generally agreed upon as universal in a group's life.

Task and Maintenance roles are seen as functional in helping the group work effectively. Self-oriented roles are viewed as highly dysfunctional to the group's effort to work.

Group member roles here are related to the task which the group is deciding to undertake or has undertaken. The purpose of these roles is to facilitate and coordinate group effort in the definition of a common problem and in the solution of that problem. The behaviors most frequently observed are these:

Initiating: Proposes tasks, goals, or actions; define group problems; suggests procedure.

Information Seeking: Asks for clarification of comments in terms of their factual adequacy; asks for information or facts relevant to the problem.

Information Giving: Offers facts or generalizations which may relate to personal experiences and are pertinent to the group task.

Opinion Seeking: Asks for clarification of opinions made by other members of the group and asks how people feel.

Opinion Giving: States beliefs or opinions having to do with suggestions made; indicates what the group's attitude should be.

Clarifying: Elaborates ideas and other contributions; offers rationales for suggestions; tries to deduce how an idea or suggestion would work if adopted by the group (reality testing).

Coordinating: Clarifies the relationship among information, opinions and ideas, or suggests an integration of the information, opinions and ideas of sub-groups.

Diagnosing: Indicates what the problems are.

Orienting-Summarizing: Summarizes what has taken place, points out departures from agreed-upon goals; tries to bring the group back to central issues; raises questions about the group's direction.

Energizing: Prods the group to action.

Evaluation-Critiquing: Critically analyzes the group's accomplishments according to some set of standards; checks to see that consensus is reached.

The roles in this category are oriented toward the *interpersonal dynamics*. They are designed to alter or maintain the group way of working to strengthen, regulate, and perpetuate the group as a group.

Supporting-Encouraging: Praises, agrees with, and accepts the contributions of others; offers warmth, solidarity and recognition.

Harmonizing: Helps the keep communication channels open; facilitates the participation of others; suggests procedures that permit sharing remarks.

Consensus-Testing: Asks if the group is nearing a decision; sends up a trial balloon to test a possible solution.

Compromising: Offers a compromise when his/her own ideas are involved in a conflict; modifies in the interest of group cohesion or growth.

Standard Setting: Expresses standards for the group to attempt to achieve with regard to interpersonal interaction; applies standards in evaluating the quality of group processes.

Following: Accepting the ideas of others, sometimes serving as an audience.

Expressing Feelings: Makes explicit the feelings, moods and relationships in the group; shares his/her own feelings with others. (Usually first to initiate).

Relieving Tension: Jokes, laughs, or in some way reduces the formality or tension of the situation; relaxes the group members.

Emotional Issues: Causes of Self-Centered Emotional Behavior
The processes described so far deal with the group's attempt to work, to solve problems of task and maintenance. But there are many forces active in groups which disturb work, which represent a kind of emotional underworld of under-current in the stream of group life. These underlying emotional issues produce a variety of emotional behaviors which interfere with or are destructive to effective group functioning. They cannot be ignored or wished away, however. Rather, they must be recognized and their causes understood. And, as the group

develops, conditions must be created which permit these same emotional energies to be channeled in the direction of group effort.

Group members who try to get their socio-emotional needs met --thereby achieving satisfaction in the group--may assume one or more of the following roles:

Aggressor: Struggles for status by deflating status of others; attacks the group or its values; jokes in a barbed or semi-concealed way.

Blocker: Disagrees and opposes beyond reason; resists stubbornly the group's wish for personally oriented reasons; uses a hidden agenda to thwart the movement of the group.

Dominator: Asserts authority or superiority to manipulate the group or certain ones of its members; interrupts contributions of others; controls by means of flattery or other forms of patronizing behavior.

Jokester: Makes display of his/her lack of involvement; seeks recognition in ways not relevant to the group task—cynicism, horseplay, or inappropriate humor; makes display of his/her lack of involvement.

Recognition Seeker: Works in various ways to call attention to himself/herself; boasts; reports on personal accomplishments; struggles to prevent being placed in an inferior position.

Help Seeker or Confessor: Tries to call forth sympathy from group through expressions of insecurity, personal confusion, or self-deprecation; uses the group to work out own mistakes and feelings.

Special Interest Pleader: Speaks for his/her own priorities that may or may not be closely related to the group task.

Deserter: Withdraws in some way; remains indifferent, aloof, sometimes formal; daydreams; wanders from the subject; engages in irrelevant side conversation.

CONDITIONS WHICH HINDER EFFECTIVE COMMUNICATION

William J. Pfeiffer

An individual's interpersonal life is dependent upon his facility for making his thoughts, feelings, and needs known to others and on his receptiveness to the attempts of others to share similar data with him. Communication, a multi-faceted phenomenon, is the result of efforts by individuals toward this end. Communication can be considered in simplistic terms as the sending and receiving of messages, since both elements must be present for communication to take place. However, the fundamental transaction of message sent and received does not presuppose that communication has occurred. Often, it has only partially occurred or has been aborted entirely as a result of the circumstances surrounding the occasion when the communication attempt was made. These circumstances may be *environmental*, *emotional*, *verbal-skill oriented*, *phenomenological*, or resulting from a host of conditions present within the individuals who are attempting to relate.

An analogy may help to clarify the concept of the effect of circumstances on the effectiveness of sending and receiving messages. In the late afternoon when you observe a sunset, the sun often appears to be a deep red, larger and less intense than it seems at midday. This is due to the phenomenon of **refraction**, the bending of light rays as they pass through the earth's atmosphere, and the higher density of dust in the air through which the light passes as the sun goes down. The sun has already moved below the horizon, but it is still in sight because its emissions are distorted by the conditions of the medium through which they must travel. In a similar way, the messages which we send to each other are often refracted by intrapersonal, interpersonal, and environmental conditions which contribute to the atmosphere in which we are relating. I may distort my message to you by giving out mixed messages verbally and symbolically, and you may distort what you hear because of your own needs and experiences. The two of us may be located in an environment, physical and psychological, which contributes to the difficulty in clearly sharing what we intend. In an atmosphere of suspicion, for example, we may both become unduly cautious in our communication.

While it is unlikely that totally non-refracted communication is a possibility over time between any two persons or with significant others with whom must deal interpersonally, an awareness of conditions which block and alter the intention of sent and received messages may produce less refraction and better communication in the long run.

Refracting Conditions

Preoccupation Emotional Blocks Hostility Charisma Past Experiences Hidden Agendas Inarticulateness	Stereotyping Physical Environment Mind-Wandering Defensiveness Relationships Status

Some of the conditions which cause refraction can be labeled and examined in the light of their impact on effective communications. One such condition is **preoccupation**. An individual who is focusing on internal stimuli may listen in such a way that none of the message comes through or so little of it that he cannot grasp the message appropriately and may respond in such a way that his blocking of the message is apparent. A story is told of a columnist in New York who attended numerous cocktail parties and had come to believe that a certain socialite was so preoccupied with making an outstanding impression on her guests that she was unable to hear anything they were saying. To test his theory he came late to her next party, and when he was greeted effusively at the door by the hostess, he said, "I'm sorry to be late, but I murdered my wife this evening and had the damnedest time stuffing her body into the trunk of my car." The super-charming hostess beamed and replied, "Well, the important thing, darling, is that you *have* arrived, ·and now the party can really begin!"

A second condition may be an **emotional block** to the direction which the message is taking. Words may have become emotion-charged for an individual, possibly due to his conditioning in childhood or to current circumstances in the individual's life at the time the communication attempt is made. An example might be of the well-intentioned, but unaware adult white male who in speaking to an adult black male makes reference to "you boys." A woman who is having difficulty in conceiving a child may not be able to discuss Aunt Mary's comment, "Now that you and Bob have been settled for a few years, it would be nice to start a family," or she may find herself responding irrationally to a lecture on population control.

Hostility may create refraction of messages. This can occur when communicating with an individual with whom you are angry, or it may be a carryover from a recent experience. It may also be the subject matter which arouses hostility. When individuals are engaged in a hostile confrontation, they often distort messages from the other in such a way that provides fuel for further venting of hostility. A husband and wife may have the following type of exchange of messages:

He: "I really thought I was helping you when I… "

She: "Are you trying to tell me that I was incapable of… "

He: "You aren't capable of much of anything! Just look at the state of our finances."

The intended message of the husband was, "I know I've made you angry by my action. Where did I go wrong?" The angry wife chooses to interpret the word "help" as an accusation that she lacked resources to handle the situation. Her message elicits further distortion and hostility from the husband. In another example, a man may come home from just having had a confrontation with his boss and may carryover his hostility to his family by over-reacting to his wife's messages concerning the her workday's irritations, or he may simply filter out all messages and respond in monosyllables to any attempts at communication. The subject matter being dealt with may engender hostility and thereby distort the message. A father may comment that his son should plan to have his hair trimmed for his sister's wedding and find that his message has been refracted as all-encompassing criticism of his son's life style.

The **charisma** of the sender of a message may affect how the message is received. Political candidates are often chosen more for their possession of this quality than for their other attributes. A charismatic person can often make tired, trivial messages seem new and important to the receiver; however, this too can become detrimental to communication since the receiver of the message is less likely to question or ask for clarification of the message. How often have we come away enthusiastically from having heard a dynamic speaker, only to remember that we cannot actually remember the content of the speech? Conversely, an individual who has something important and unique to say to us may not be able to hold our attention in such a fashion that we hear the message he is sending.

Past experience can predispose us to refraction. If the weekly staff meetings where we are employed have always been a waste of time, we may come into each succeeding meeting expecting not to give messages sent much consideration or to hear them as having no relevant implications. Staff meetings may also nurture another kind of condition which may create message refraction. An individual with a special interest, i.e., a hidden agenda, may hear all messages only in reference to his own needs or may not be able to hear messages which do not relate to his own interest. If his/her hidden agenda is in competition with another employee, he/she may reject all the suggestions made by the other person or may attempt to manipulate others into distorting the other's messages. He/she might make such comments as, "Of course, Claire has no real expertise in this area," or, "We all know that the administration will never buy that, Claire." The individual with this hidden agenda may dismiss an excellent idea from someone with a fresh perspective.

Simple **inarticulateness**, or lack of verbal skill, may distort the intention of the sender. Since clarity is essential for the true message to be received, an individual may never be able to communicate effectively if he/she has never developed verbal skills. If the receiver of the message is unaware of the sender's difficulty, that person may dismiss the messages or distort them. Verbal patterns which are culturally determined may also hinder communication since they could function as a lack of skill when the message is received. Individuals from a minority culture may be quite articulate within their peer group but may fail to get their messages through when speaking to an individual from another culture. It is at this point that verbally administered standardized intelligence tests become invalid. An Appalachian child was once being tested by a psychometrist, who asked that the child name the seasons of the year. The child replied, "Deer season, 'possum season, and fishing season …" The child showed an excellent grasp of seasonal variation throughout the year, but because the response was not the standard one, the score on the test was reduced.

Culturally-determined verbal patterns may lead to another type of communication distortion -- **stereotyping**. Eliza Doolittle was "heard" and understood as a charming, if unconventional lady once her speech patterns had been altered from their original cockney flavor.

However, Eliza hadn't changed her values or increased her worth as a person in changing her speech patterns; the only change was in her ability to send messages as a refined lady rather than as the stereotype of a thoroughly dismissable guttersnipe. Another type of stereotyping which causes adjustments in a person's perceptual prism is that of the visual impact of the speaker. A very conventional individual may "hear" all attempts at communication as radical if the speaker has a non-conventional physical appearance. A conservative member of the faculty at an urban university may hear a bearded colleague with pierced ears say, "Perhaps some of the experimental programs such as the bachelor's degree in general studies would serve the needs of our particular group of students better than the traditional degree programs seem to do," and angrily dismiss the idea as an attempt to downgrade the "standards" of the university. Yet a conservative-appearing colleague might make the identical proposal; and the faculty member could respond with, "Yes, we need to have more flexibility for our particular student population."

Physical environment alone may create conditions under which communication cannot take place effectively. A stuffy, warm room may make it impossible to send and receive messages accurately. An individual's physical state may also be detrimental to communication Any teacher will expound at length on the decline in understanding on the part of the students as summer approaches in a non-air-conditioned classroom. Physical environment may contribute to another condition which may get in the way of communication. Mind-wandering is a state to which all are susceptible. This distracts from the message sent in much the same way that preoccupation distracts, only the internal stimulus may never focus on any topic for more than a few seconds. This inability to focus for long on internal stimuli will generalize to the external stimulus of a sender's message.

Defensiveness leads to continual refraction of messages received. The insecurity of the individual tends to distort questions into accusations and his/her replies into justifications. A husband may ask his wife if she happened to get a six-pack of beer when she was grocery shopping His intention is informational, i.e., he is going out for cigarettes and will pick up some beer at the same time if she hasn't already bought some. The issue is duplication of effort. The insecure wife, however, may respond as if the issue were her ability to meet his needs, "No, I didn't. I can't think of everything, you know, when I've got a job, too, and the kids with me and time is getting short and I can't even find a decent roast that we can afford. I suppose you think my buying beer is more important than preparing a good meal tonight!"

When we are attempting to communicate with another person, we are giving out two sets of messages simultaneously, content and **relationship**. The other person may be so preoccupied with hearing any cues about the latter that the content is lost or seriously refracted. For example, a boss tells her administrative aide that she has a set of instructions for her and that she wants her aide to be sure that she gets them right. If the aide is insecure in her relationship with her boss, she me hear an implication that she is being evaluated negatively. Consequently, she may distort her hearing of the instructions.

Perhaps the most difficult condition to overcome in communications is that of **status**, since it encompasses most of the elements which have already been discussed. Those in positions of high status may find communication difficult with most of the people with whom they must interact since perceived power differentially affects various individuals. One person may be preoccupied with impressing the source of power, while others may be defensive, feeling that their jobs or perhaps their own status is threatened by the powerful individuals. Also, any high-status person must deal with the hostility of the envious, the stereotyping of the power-worshipper, the past experiences with other high-status individuals that people may be generalizing from, and the emotional elements generated by all these conditions.

The means of alleviating these conditions which interfere with the communication process are as varied as the people who must deal with them. The key, however, is in becoming aware of the conditions which are interfering with the process and attempting to modify behavior in such a way that messages are less often and less severely refracted.

TOOLS TO HELP MEETINGS

Some tools are **diagnostic**. For example, the Meeting Assessment Scale lists 30 behaviors which occur during meetings. You've already had an opportunity to work with it earlier in this manual. Other uses are numerous. For example, it could be a diagnostic tool is you provided copies for each participant to complete during a meeting. By comparing the average scores of the group with the scoring sheet norms, you and the group would have plenty of discussion material and a good picture of where to start on improving your meetings.

Many meeting facilitators use quick **mid-session or wrap-up** questionnaires to provide the group with a "photo" of how people are feeling and what they would like to have happen. Often, these simple tools are distributed just before a break, scored during the break, and the findings posted and discussed after the break. Doing this type of mid-course correction provides participants with the chance to vent frustrations, pass along suggestions to both the facilitator and colleagues, and to reflect on their own behavior as group members. Schindler-Rainman and Lippitt provide such a "stop-action" tool. Note that the instrument is *brief* and that the information gathered is to be used by the group. This technique can be a helpful, informative and non-threatening way to keep meetings on track.

End-of-meeting forms can help you and the group to see:

- What to do next.
- How meeting participants are feeling about what went on.
- What people particularly enjoyed about the meeting, etc.

In adapting these forms to your groups' uses, you may want to focus on the goals you had framed for the meeting, the **agenda** items and timetable you had agreed on, and any understandings, "**ground rules**" or norms the group had bought into before it began work. This kind of tailor-made evaluation helps the group reflect on its effectiveness in terms which members understand (having agree in advance on goals, agenda, ground rules). In this way, the evaluation process provides information important to the group as it reviews its own effectiveness and plans for the future. Note that the emphasis is on ***group*** use of the data, and not on the leader's use. When this type of information is collected and isn't fed back, the participants lose interest and, in some cases, seem to feel resentful that someone is "checking up on them" for unknown or trivial purposes.

LOOKING AT PROCESS AND PARTICIPATION

Eva Schindler-Rainman and Ronald Lippitt

One of the effective procedures for improving the productivity and satisfaction of any meeting is to use one or more of the available procedures for helping the group review their own working process and make decisions about ways they would like to make their work more satisfying and productive.

Such "process checks" may take no more than 10 minutes, and the savings is many times this. Here are four ways used most frequently to review the work process:

A "stop session" tools is used to help a group quickly collect data on "how they are doing" and to make decisions about what improvements they would like to have.

When the agenda is developed, an item about midpoint in the agenda is entitled “Taking a look at how we’re doing.” The leader asks the group to share diagnoses and help with ideas for improvement.

An outside consultant, or a member of the group, is asked to serve as a process observer and to make observations when he or she sees an opportunity to make comments that will help the group become aware of blocks in communication or possible alternative procedures that might be helpful.

A fourth procedure is an end-of-meeting feedback instrument that permits group members to give reactions to the meeting as a basis for improving the process of the next session.

BRIEF STOP ACTION CHECK

To help improve our group's work and productivity

1. How do you feel about how you are being listened to? ***PLEASE CHECK.***

Very fully	Pretty well	Not too well	Quite poorly

2. How fully do you think you have been listening to and using the ideas of the other group members?

Very fully	Pretty well	Not too well	Quite poorly

Please comment on why you checked where you did.

3. Please share your data with each other and agree on an idea or two on how you might improve the group's work as you continue.

COMMUNICATIONS and GROUP PRODUCTIVITY

A QUICK CHECK

1. What barriers to communication, if any, seem to be operating in this meeting? Please name one or more.

2. What can be done to improve group productivity? List 2 or more ideas.

3. Please share your thoughts on the two questions and decide what the group might do to improve the ways you work and think together.

MEETING EVALUATION FORM

Meeting of: ____

Location: ____

Date(s): ____

Leader: ____

1. The agenda for the meeting included those topics or issues which I believe were the most critical to the group.

1	2	3	4	5	6	7
Completely poor	Very poor	Below average	Adequate	Above average	Very good	Extremely responsive

2. The person(s) responsible for calling the meeting were well organized and prepared.

1	2	3	4	5	6	7
Never	Usually not	Infrequently	Sometimes	Frequently	Usually	Always

3. There were adequate opportunities during the course of the meeting to share my ideas with others.

1	2	3	4	5	6	7
Never	Usually not	Infrequently	Sometimes	Frequently	Usually	Always

4. I felt prepared to discuss the issues either because of my knowledge of the topic and/or because materials relating to the topics had been given to me in advance of the meeting.

1	2	3	4	5	6	7
Never	Usually not	Infrequently	Sometimes	Frequently	Usually	Always

5. The pace of the meeting considering the amount of work to do was:

1	2	3	4	5	6	7
Very good	barely adequate	tolerable	satisfactory	above average	almost perfect	just right

6. At the end of this meeting, I had a clear idea of what was decided.

1	2	3	4	5	6	7
Total confusion	Too much confusion	some confusion	adequate clarity	better than I'm used to	It was very clear	It was perfectly clear

7. At the end of this meeting, I felt that my role in carrying out each decision or task was clear, including these items:

Total confusion	Too much confusion	some confusion	adequate clarity	better than I'm used to	It was very clear	It was perfectly clear
My responsibilities;						
1	2	3	4	5	6	7
The lines of authority;						
1	2	3	4	5	6	7
The time frame;						
1	2	3	4	5	6	7
The resources available;						
1	2	3	4	5	6	7
How information will be exchanged concerning progress and difficulties; and						
1	2	3	4	5	6	7
The evaluation criteria (if any)						
1	2	3	4	5	6	7

8. With respect to the number of meetings of this group, I would like:

1	2	3	4	5	6	7
No more meetings	A lot less	A few less	Status quo	A few more	A lot more	Twice as many

9. How would you rate the general atmosphere of this meeting in terms of group processes/dynamics?

1	2	3	4	5	6	7
Terrible	Marginal	Below average	The usual	Better than most	Very good	Terrific

10. How would you rate the topics covered in this meeting in terms of assisting you to better perform your functions?

1	2	3	4	5	6	7
Terrible	Marginal	Below average	The usual	Better than most	Very good	Terrific

11. How would you rate the structure and format for this meeting in terms of work to be done?

1	2	3	4	5	6	7
Completely Inappropriate	Barely tolerable	Below average	Average	Above average	Very good	Terrific

12. How would you rate the overall performance of the leader(s) of this meeting?

1	2	3	4	5	6	7
Completely Inappropriate	Barely tolerable	Below average	Average	Above average	Very good	Terrific

13. What was the least relevant portion of this meeting and why?

____

____

14. What one thing would you like to see improved or changed before the next meeting of this group?

____

____

15. Other comments:

____

____

____

____

Thank you for your help. All persons attending this meeting will receive a summary of the results.

In summary, running effective meetings may require changing the way things have been done in the past. However, taking the time to make these changes should increase the productivity and efficiency of your group meetings.

Remember that planning and the inclusion of the ideas and opinions of the whole group will help ensure that the group is able to complete the task(s) effectively. The group leader should enable the group to plan and communicate clearly. Feedback should be a priority so that all group members feel that the project will be completed well and on time.

Suggested Readings

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