TWO KEY ROLES FOR EFFECTIVE TEAM MEETINGS: TEAM FACILITATOR AND ISSUE CHAMPION

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Teams are among the most potent problem-solving and decision-making forces in modern organizations -- when they are functioning effectively, that is. In order to function well, two aspects of the team's work need to be managed well -- the **process** of the work and the **content** of the work.

This article describes two roles, each of which relates to one of these critical aspects. The role of team facilitator deals primarily with the team's process. The role of issue champion is designed to help manage the content of the team's issues.

TEAM FACILITATOR: Team facilitators have the responsibility for making it easy to get the work of the team done. This means facilitators pay attention to HOW things are being discussed as well as to keep track of the various points that are being made. A facilitator's role includes these aspects:

Manage the start-up of the team's process. If people don't know each other, help them to become acquainted. Get clarification about the purpose of the meeting. If necessary, help the team to review what has already been done or discussed (sometimes contained in minutes or meeting notes from previous meetings). State or have someone state the basic issue the team is to focus on during its discussion. Clarify if the discussion is for the purpose of exchanging ideas or to coming to a decision. Get agreement on the time that is being allocated for each part of the meeting. Help the discussion to get started by inviting participation.

Monitor the team's process throughout the discussion. If the discussion slows down, invite people to share facts, information, or opinions related to the issue. If one or a few persons are dominating the discussion, briefly summarize their points and immediately ask others to add their comments.   If someone is having difficulty getting into the flow of the discussion, act as a "gatekeeper" and help them enter into the team's dialogue. Search for and reflect harmonious and contrasting views revealed by the discussion. Notice behavior that distracts the team from maintaining a consistent focus on its work, and help it to move quickly past the distraction and get back on track. Focus on maintaining a completely fair-minded perspective about every person's participation, showing special favor to no one in particular. Work to set a climate of acceptance and trust through careful listening, reflection, encouragement, and support for individual contributions.   Keep track of time and remind the team of its schedule when necessary.

Maintain a record of the team's discussion points. Use a flip chart or other device to record key points where every team member can see them clearly.   When recording an individual's point, use their exact words as much as possible. Paraphrase their point in summary form if necessary to shorten it; be sure to check it for accuracy of intended meaning with the individual before moving on to the next point. When using a flip chart, use a variety of colors to distinguish between points and make a strong visual impression to encourage participation. Develop graphic representations of points and relationships among points whenever possible

(use arrows, circles, boxes, lines, figures, etc.). Number things for easy reference by team members. Number pages so they can be accurately transcribed later. Accurately and completely record the exact terms and conditions of decisions and agreements the team makes.   When an action step has been decided upon, identify and name an individual who will be responsible for following-up and the date by which their action will be completed or reported back to the team. (Three key action words: WHAT is going to be done? WHO is responsible? By WHEN will it be done?)   Summarize the recorded points and check for accuracy, additions, changes, etc.

Moderate a discussion at the end of the meeting, after the content work has been handled, to help the team evaluate the quality of its process. Check on adherence to the schedule. Ask about participation patterns or dominance patterns that inhibited participation. Review appropriate or inappropriate behavior that helped or hindered the team's process. Ask people to indicate their overall satisfaction with the process. Find out what the general feelings of members are toward the team as a result of the discussion. Ask about things the facilitator did that helped or hindered the team's process. Focus on improvements that can be made at future team meetings.

In order to perform their role, facilitators must be able to:

- Maintain a neutral position regarding the merits of the issue being discussed so they can assure a completely fair-minded approach to managing the discussion.

- Be sensitive to the subtleties of group process that sometimes influence the quality of discussion even at the subconscious level (e.g. gender or age bias, misuse of authority, individual need to dominate, language and cultural differences, etc.), and act to enable people to move beyond these issues and stay focused on task.

- Listen with an open mind to genuinely hear the intended meanings of discussion participants; paraphrase when necessary to check for accuracy of meaning.

- Follow the logical flow of the discussion and bring the team back into the flow when they deviate temporarily into side issues.

- Gently yet firmly confront the team or team members regarding behavior that detracts from the quality of the discussion process and bring them back to focus.

- Be clear about their own needs relating to the discussion and, if they find they must step out of the neutral facilitator role, to do so clearly and deliberately.

- Secure the support of team members for performing the facilitator role regarding either a particular issue or for an entire segment or meeting.

With the appropriate attitude and skills, any team member can serve as facilitator for any issue or other part of the team's process, as long as they are willing to suspend their interest in the content of the issue while they are facilitating the process.

ISSUE CHAMPION: Issue champions are responsible for achieving an outcome that is desired by the team regarding a given issue.   This means that issue champions focus on WHAT the issue is and serve to weigh the various benefits and costs concerning the issue. Attempting to substantively influence the team is legitimate. An issue champion's role includes these aspects:

Collect information related to the issue in preparation for the team's discussion. Define the issue in whole and related parts to make detailed discussion more effective. Research published materials. Interview people with experience related to the issue. Identify people who are affected by the issue and seek out their opinions and feelings.

Clarify the issue for discussion. Sharpen the various aspects to be considered by the team. Provide relevant facts, information, and opinion about the issue that will influence the team's discussion. Position the issue so that the team can clearly understand the various aspects needing attention.

Coordinate the arguments for and against the issue. Assure that all aspects of the issue are given attention and are fully explored for implications. Challenge assumptions that are erroneous. Check facts for accuracy. Search for contradictory opinions. Develop the logic of arguments concerning the issue which can lead the team to a conclusion.

Close on the decisions or actions that are necessary to produce the desired outcomes. Summarize the arguments that have been made concerning the issue. Develop any inferences that logically follow from the arguments.   Specify the logical conclusions that support decisions or actions that should be put into effect. Relentlessly pursue consensus agreement from all team members, if possible. If consensus agreement turns out to be impossible to achieve, use other appropriate decision-making procedures such as voting or recommending for executive decision. Assure that someone agrees to be responsible for follow-through on the issue if you do not take that responsibility yourself.

In order to perform their role, issue champions must be able to:

- Think clearly and analytically about issues.
- Define issues in whole and in their parts.
- Conduct independent research and investigation concerning relevant issues.
- Bring a noteworthy degree of passion to their consideration of relevant issues.
- Make creative use of conflicts and differences in perspective.
- Tolerate ambiguity during the exploration stages of the discussion.
- Be relentless in closing on a decision when the time is right to do so.
- Take responsibility for a high level of commitment to achieving outcomes related to their issues.

Any team member can serve as issue champion on any given issue as long as they are not simultaneously serving as team facilitator. An issue champion is expected to care passionately about an issue with which they are concerned. Facilitators, in contrast, must be substantively neutral if they are to perform their role in a trustworthy manner. In tandem, both roles can help to make a team's discussions both challenging and productive.