

Trustee Insights

BOARD RESPONSIBILITIES



Elevate Your Facilitation Skills

Guidance for board and committee chairs

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Have you ever asked yourself any of these questions before or during chairing a board or committee meeting?

How can I ensure that I facilitate robust discussions on critical issues?

- How do we make sense of multiple perspectives that appear to contradict each other?
- Am I prepared to respond to myriad scenarios that may arise during the meeting?
- How can I be sure to engage all participants?
- How do I know when it is appropriate to intervene and redirect the conversation?
- How will I handle a conflict or difficult emotions that arise?

Even the most seasoned chairs may be unsure of their ability to notice and support group dynamics in the boardroom, particularly when things get complex, unclear or contentious.

Effectively leading a board requires a high level of self-awareness and self-management. Boards are networks of people with diverse talents, experiences, preferences, perspectives, opinions and styles. Great chairs can read these distinctions in people and create relationships with all stakeholders. They are outstanding facilitators who make everyone at ease and feel safe enough to share their thoughts, respectfully debate others' views, make decisions and act.

Successful facilitation involves

creating an environment that encourages engagement, learning, collaboration and action. It's more than creating and following an agenda. A facilitator must balance process and content. It's facilitating people to do meaningful work aligned with a purpose. Being chair means you are ultimately responsible for the quality of the meeting experience.

Meetings are a collaboration tool for connecting people and moving work forward. An effective meeting yields meaningful outcomes. As chair, you gather volunteers, answer questions, coordinate action, resolve conflicts, handle egos, manage behavior issues and set boundaries. We'll look deeper at the mindset, skills and approaches required to elevate your facilitation skills so you can help your board colleagues make their best contributions.

Preparation — Start with yourself

Successful facilitators are as aware of what's going on inside of them as they are of group dynamics. This awareness helps them make decisions about process, pace and interventions.

Mindset

Purpose is the guiding star of facilitation. Effective facilitation anchors decision making and promotes strategy in alignment with purpose.

Conventional thinking on facilitation instructs us to listen, be curious and refrain from imposing our point of view — to be neutral. On the other hand, the chair's distinctive perspective will be required at times to guide the board forward.

As a facilitator, you manage group dynamics so participants feel safe expressing their opinions and engaging with one another. The idea is to get all perspectives on the table while providing room for disagreement. When preparing for a meeting, it's natural to have some anxiety. The chair's responsibility in high-stakes meetings is to regulate their own emotions, while assisting board members in managing theirs.

Presence

Our presence is a combination of how we show up in the room and how we express our energy to others. It's how others perceive us. It's how we create space, gather attention and engage others without dominating the conversation. Although it may appear intangible, a facilitator who is conscious of their impact on others will be more effective. When we're distracted and overwhelmed, it's a challenge to be present with the people for whom we need to be present, let alone to lead from this place.

Excellent chairs are self-aware. They seek to understand their thoughts, feelings, bodily sensations, beliefs and values. They aim to respond rather than react to challenging situations that arise in a meeting. This knowledge helps them in deciding whether to intervene in the dialogue. Being at ease and grounded sets a good example

for others. The ability to project calm energy and confidence communicates that the meeting is in capable hands. When you've focused your attention and become aware of yourself and others, you'll be able to meet whatever comes your way in the meeting.

I once asked a committee chair I was coaching about her thoughts on a challenging situation. "You mean my emotions?" she replied. "I'm a CFO and don't consider feelings." She then shifted topics. This chair lacked self-awareness and struggled to engage committee members.

Consider your responses to these questions when you are at a meeting and face difficult or emotionally charged situations.

- What emotions am I feeling?
- What assumptions do I have about the other person or situation?
- What are the facts as opposed to my interpretations?
- What are my core values, and how do they influence my reactions?

Facilitation Skills

The foundation of facilitation is listening, asking questions and summarizing. Skilled chairs must be capable of doing all three. Clear and concise communication is required to deliver information to the board and guide decisions. This includes not only communicating information, but also assisting the board in understanding what they are to accomplish and how they are supposed to contribute.

Listening. Active listening is one of your most valuable facilitation skills. It requires a conscious effort to get an accurate understanding of

from where someone is coming. In active listening you set aside your own response to what someone is saying and instead focus on really listening and helping them feel heard.

Listening begins with the desire to listen. The tone is set by open and inviting body language. Reflecting on what you heard and understood builds trust. Pay close attention to what is stated and what words are used, such as descriptive or emotional terms. Take note of non-verbal cues. Check for accuracy. "Did I get that right? What did I miss?" End with appreciation and empathy. "I really appreciate your experience. I get why you felt the way you did."

Asking Questions. A powerful facilitation skill is the ability to ask great questions. Asking questions can clarify issues and support people to explore their needs. Facilitators can ask clarifying questions to get a clearer understanding of what someone is saying or to explore a topic through open-ended questions. An effective question can change the course of a conversation, foster relationships and trust, and reveal vital insights.

Summarizing. Regular summaries of the discussion can help avoid repetition by reassuring people their points have been heard and highlighting the key issues raised. The facilitator should offer the summary tentatively and give people space to correct them. "What I've heard so far is ... Did I miss anything?"

Developing Adaptability

You may be a confident and experienced chair with strong listening skills and the ability to engage

fellow board members, as well as a reputation for sticking to the agenda and managing time like clockwork. However, rigorous adherence to the agenda might limit what is emerging in the meeting. An agenda is a strategy for approaching the meeting. If you keep to the plan, you can cut short robust, meaningful and generative discussions. Being adaptive requires a delicate balance between having a strategy and knowing when to pivot in service of the purpose. There is an interplay between structure and flexibility. It's fine to deviate from the script if you believe a complex topic requires extra discussion. This necessitates being skilled at reading the room, picking up on non-verbal cues and gauging energy levels. Trust your capacity to flex with the needs of the board.

Managing the Meeting Structure and Outcomes

The meeting structure is your strategy for conducting the meeting. Every meeting has a beginning, middle and end. When new ideas are needed, divergent thinking is used. This phase is characterized by brainstorming and exploring "what if" questions. This is a messy phase. When people build on the ideas of others, new ideas and possibilities emerge from the mess.

Next, the chair can surface questions and invite reactions. You can ask, "What would you consider a good result from this conversation?" while introducing the topic. Make sure you invite quieter members to speak. Eventually, the board must narrow the possibilities and converge on a direction, decision or

action. This new direction becomes the new shared perspective and the basis for action planning and commitments.

Board members arrive to a board or committee meeting from different mental and emotional places. As they enter the boardroom, many are multi-tasking and preoccupied. Arrive early to the meeting so you can greet and invite members into the space. Effective meetings begin by engaging and bringing them into the conversation. When bringing the meeting to order, the chair's responsibility is to build connection and rapport. After welcoming everyone, walk through the agenda and flow of the meeting. Review roles and agreements. Use engagement tactics like "mission moments" (stories, anecdotes, experiences related to the mission) to anchor the board and connect them to the organization's mission.

Hospital and health system boards must deliberate on complicated and consequential topics. Whether the topic is quality and safety, workforce, new partnerships, digital health, cybersecurity, investments or financial sustainability, chairs are constantly managing polarities while working with limited resources and competing priorities. They must balance the needs of the hospital/system with the needs of the community; the system's needs with the needs of local entities; and the board's needs with the needs of the management team.

The chair should approach any discussion with a few goals in mind. A constructive dialogue and a successful outcome are more likely with effective framing. First, introduce the topic and explain why it is currently

important. Second, determine what has to be done (e.g., action decided, vote taken, etc.). Third, promote open conversation and seek to have every board member weigh in on the subject. Finally, request the desired outcome and assess the necessity for further discussion.

As chair, your facilitation assists the board in moving toward decisions and acting collaboratively. Listen for agreement. Sometimes a member expresses an opinion that represents the board's position or preference. You'll feel the group relax. You can also say, "I think we've reached an agreement." Allow more time for debate if the group doesn't reach consensus. Capture the partial agreement and proceed to the unresolved part.

As the agenda nears the conclusion, go over the commitments and decisions made about next steps. Ask, "What are we going to do because of today's discussion?" Ask, "Is there anything else that needs to be said on this topic?" Ascertain agreement by asking, "Is everyone willing to leave the meeting supporting the decision we made?" "If not, what would make this work for you?"

Troubleshooting Challenges

There are some common challenges that chairs encounter regardless of the type of board on which they serve. As a facilitator, you may need to interrupt the meeting process to refocus members and balance group interactions. Most interventions can be traced back to the norms/ agreements. Generally, begin with the least intrusive level of action that poses the least risk to

the individual or group. Examine the effect of the behavior on the group. Check in with yourself by taking a deep breath. It's difficult to facilitate when you are provoked and feeling angry or anxious. Speak clearly, using a firm, respectful tone of voice and non-threatening body language. At times, it may be preferable to engage with the person alone to learn what motivates them, and at the very least, to provide feedback to assist them to understand how their behavior impacts the group. As a general guideline, intervene when communication is not concrete, respectful or group centered.

Here are some common challenges and suggestions for how a chair can intervene and adjust the meeting process. Interventions are much easier if there are established expectations and boundaries. Guardrails are necessary for all groups. These guardrails are provided by group agreements, standards, and codes of conduct. They support participants to show up and engage well. They can help the chair in redirecting or intervening when necessary. When the discussion gets off track, you can refer to these expectations. You must be willing to interrupt, intervene, redirect, summarize and pivot to enable an excellent meeting with good energy, strong involvement and constructive alignment. This can be difficult, but it is necessary.

Challenge #1: Monopolizing

Sometimes, a member monopolizes the conversation and doesn't let others speak. It takes a delicate balancing act to redirect this individual without insulting them. You run the danger of other members

becoming disengaged if you do not intervene. Here is an appropriate way to intervene, "Janet, I'm going to step in here and ask you to pause for a moment. I've heard your point clearly, and I want to be sure we can include other perspectives as well. To summarize what I heard you say is... Thank you. These are important points and I know you have strong feelings about them. Let's share the floor and explore other points of view before making a decision."

Challenge #2: Big Personalities

Board members with dominant personalities who do not reflect group agreements or support the meeting agenda pose a difficult facilitator challenge. It's even more difficult when the person believes they have more influence than others in the room. As a result, the chair may feel unable or unwilling to communicate directly about what's going on. Establish your authority as leader of the board. When a new chair takes over, he or she may inherit a meeting that has previously been facilitated ineffectively. It is critical to identify your expectations, how you will uphold norms and agreements, and when you'll intervene. This establishes the expectation for how you can interrupt, redirect and redirect again.

Challenge #3: Disengagement

Pause and do a temperature check when the meeting feels uninteresting, repetitious or inefficient. Ask about the level of engagement. "It appears that we are revisiting old decisions which drains our energy. What is it that hinders us from moving forward with the conversation?" If your perception is accurate, ask

the group to recommend a change that would improve the experience. Consider whether you need a break. Or perhaps the topic can be handled by a smaller group?

Challenge #4: Conflicts

Tension and conflict show up in different ways. For some, it's out in the open; in others, it goes underground till it erupts; and in others, cliques form and sub-groups conduct informal meetings outside the formal meeting. It's normal for boards to develop tensions, frustrations and disagreements. Sometimes members have personal agendas. When people are passionate about the mission and invested in making a difference, there will be communication breakdowns.

As chair, you need to respond on behalf of the organization's needs. Ask yourself, "How can I support healthy and productive tension and conflict?"

- 1.** Use norms and agreements to reorient members. If unproductive conflict emerges, or if the atmosphere is disrespectful or unpleasant, it is your responsibility to bring the shared agreements and purpose back into focus. It takes skill to intercede. Consider how you can respect, acknowledge and empathize with others while encouraging them to change their behavior.

- 2.** Focus on shared interests and commitments. Ask people who hold opposing views where they have similar concerns or where their interests are aligned. Demonstrate listening and use reflection. Remind everyone why you're working on a specific agenda item. Consider what motivates each viewpoint. Ask yourself, "How could we address

the needs and interests of both perspectives?”

3. State your observation and interrupt if needed. Be proactive. When disagreement becomes heated, and you believe it is unproductive, state your opinion. You can ask, “What would be most helpful to you right now?” or “Do we need to table this issue for now or adjust the agenda to better understand the issue? The tone of the conversation has shifted from generative to argumentative. I realize people have diverse points of view. Let me summarize what I’ve heard. (To the first person) I heard you say and care about ... and what is important to you is ... (to person 2) I heard you say, in contrast, that you believe ... and you think we should ... key difference is ... did I capture it? I want to open the conversation to others to get additional input. And, then come back to you to invite more

comments.”

Challenge #5: Getting in the Weeds

The chair is responsible for facilitating discussions on fiduciary, strategic and generative discussion topics (Chait et al, *Governance as Leadership: Reframing the Work of Nonprofit Boards*). If board members begin to “get in the weeds” and wander into operational concerns, it’s critical to bring the conversation back to high-level governance issues. “Bob, I hear you getting into operational details. At our recent retreat, we agreed to keep our conversations at the governance level ... and to be receptive to feedback if any of us get bogged down in the details.”

Reflection

Great chairs reflect on their experience as lifelong learners. Following the meeting, consider these ques-

tions:

- Was I present during the entire meeting?
- When did members become truly engaged? What did I do to encourage their participation?
- What outcomes were achieved?
- What opportunities did I miss?
- What did I learn?

Successful facilitation is both a skill and an artform. The time and effort put into mastering this challenging role will pay big dividends for the organization, board and chair.

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