

Facilitator's Documents
Farm/Ranch Succession Planning Workshop
November 22, 2013
Anderson Valley

General Guidelines for Facilitators
AVLT 2013

Our responsibilities as facilitators:

1. "Creating the container"
 1. Create structure
 2. Set expectations
 3. Keep group on track
2. Monitor and enforce agreements (time a particular challenge)
3. Listen, be present, with complete acceptance, suspend judgment
4. Model good listening, support, safety, honesty
5. Take care of the needs of the group – Notice cues from participants, and from your own gut
6. Listen without personal agenda (getting someone to see what you think they should do)
7. No judgments, open-minded

We don't transform people, we create space for them to transform themselves.

Facilitating IS NOT:

- Fixing
- Associative story-telling
- WHY questions
- Interrupting
- Interpreting
- Judging
- Reactivity
- Processing your own stuff
- Inattention

How do we do that?

1. Setting up the space
2. Set expectations and describe structure
3. Tell them the goals, how we propose that be done, time allotted
4. Review core agreements
5. Check-in
6. Clear description of what you expect them to do
7. Starting the process
8. Monitoring time
9. Enforcing the agreements – making assertive, but non-judgmental statements
10. Closing the group – appreciation

TOOLS

To help you feel safe

- Breath
- Lower your expectations – don't expect to be perfect, and you can ask for help

To help group know what to do

- Clarity – give instructions to set expectations
- Model what you want
- Have some notes or a 'script' so your plan is clear to YOU

To help people go deeper, without steering

- Pause
- Using open-ended questions – "Tell me more..."
- Reflective comments (without interpretation)

To help the group feel safe

- Remember they **rely** on **you** to 'enforce' the agreements. If you feel uncomfortable, others are too, and they want you to take control as you are the leader.
- Interrupt – use the power you have to protect the group
- Using "I" statements
 1. What I observe or experience,
 2. How it affects me (as facilitator),
 3. What I would prefer (making a suggestion),
 4. Benefits to the group

- Making an unarguable statement that is true for you. – “I’m worried that we won’t have enough time to give everyone their turn.”
- From my perspective. – “When I hear you say ..., I notice I feel worried, because I interpret that”
- If you are insecure in your assessment, you can say “I’m feeling..., is anyone else noticing that too?”
- Tune in to the group’s energy, comment on that (it isn’t about a specific person). What do you sense about the energy of this group right now? What could be done to shift it?

Remember you can ask for help!

Own it if you ‘make a mistake’ – you are modeling imperfection which creates a sense of safety for everyone else to take a risk.

Some frequent challenges in managing the group and time –

- Letting people know their time is up
 - You may want to ask someone else to be the timekeeper
 - Having a sound (like the chime on your timer) rather than having to speak makes it easier
- Helping someone get to the point
- Stopping advice-giving or judgments or criticism of group members

Review -- Keys to supporting group processes

- *Attitude* - Being grateful for the opportunity to serve the group
- Bring everyone’s voice into the room with a low-disclosure go-around (check-in)
- Set expectations – state goal for time, give time frame, format for time period, and how you will engage (go around clockwise, or as chose to share...)
- Review the pertinent ground rules or agreements (confidentiality, respect, shared responsibility)
- Give CLEAR instructions about what you want from them, and the time expectations
- Pay attention to what is happening – content *and* process
- Comfortable with emotion and its expression
- Nonjudgmental

Compiled by: www.MollyStranahan.com www.PathToHappiness.com

- Keep to the plan, or comment on change if you notice it happening, or if you want it to happen
- Able to intervene when someone is making group unsafe (can handle challenging participant behaviors)
- Non-defensive reactions (open to criticism or feedback)
 - Trust that you are good enough as you are
 - Let go of evaluating your performance to measure your sense of self-worth
- Expressing your gratitude in closing

GENERAL GUIDELINES FOR EMPATHETIC LISTENING: THE SHORT LIST

- Put yourself in the other person's place to understand what the speaker is saying and how he or she feels.
- Show understanding and attentiveness through verbal and non-verbal behaviors (tone of voice; facial expressions; posture; gestures; eye contact).
- Restate (reflect) the speaker's most important thoughts and feelings, and check with him or her to verify your understanding. If you have misunderstood, try again.
- Don't interrupt, offer advice, give suggestions, or reassure
- Don't ask questions that might throw the speaker off.
- Don't bring up similar problems or feelings from your own experience.

TAKING "YOUR TURN" AS A SPEAKER: HOW TO MAKE THE TRANSITION

- Express appreciation to the speaker for sharing their thoughts and feelings with you:
"Thanks for being willing to meet with me and talk this out."
- Acknowledge any new understandings or insights that you have gained in your role as a listener:
"I had no idea how frustrating this has been for you."
"I understand now how important it is for you to have flexibility in your schedule."
- Summarize your current understanding of the conflict:
"It's clear that the two of us have different ideas about how the staffing situation should be handled."
- Ask the other person to be a listener for you:
"I'd like to tell you how the situation looks from my perspective. Do you feel ready to listen?"

Adapted from Conflict Resolution Center of Santa Cruz County, 1995

EMPATHETIC LISTENING

Listening is probably the single most important aspect of effective communication, and yet it is often the least refined. Unlike hearing, which may be entirely passive and non-volitional, listening is an active process that requires your full awareness and participation.

To fully understand the meaning of a communication, you as a listener must be attentive to the non-verbal aspects of what the speaker is saying, as well as to their words. In most cases, you will need to ask questions for clarification, summarize or paraphrase what you have heard, and check with the speaker to verify the accuracy of your perceptions. The attentiveness and feedback of a skilled listener often helps the speaker clarify their thoughts as well as their expression. As a fully involved listener, you are a collaborator in the communication process.

Although active listening requires skill and practice, most people find that the rewards are well worth the effort. As a tool for the prevention and management of conflict, active listening can help to build and maintain trust and rapport, guard against misunderstanding, diffuse anger, and cool down a crisis before it gets out of hand.

Here, we talk about *empathetic* listening in order to emphasize the importance of attitude as well as technique. Your clear intention to listen, and desire to understand are necessary elements of any skill's effectiveness. If you as a listener are not psychologically present, the speaker will "get the message."

Before discussing the attitudes and skills that support effective listening, let's look at some of the most common listening "blocks."

Adapted from Conflict Resolution Center of Santa Cruz County, 1995

BASIC LISTENING SKILLS

ATTEND Create a “bubble of attention,”
a good environment for the speaker

FOLLOW Encourage speaker to continue:
nodding, “uh-huh,” open questions

REFLECT Paraphrase or restate the core of what
you’ve heard; check for accuracy

REFLECTING SENTENCE “STARTERS”

“You’re saying that...”

“For you, then...”

“As you see it...”

“So...”

“To you it seems...”

“In other words...”

MEET YOUR PEERS

“Active Listening” Break-out groups for Farm Succession Workshop

(Olivia will begin with a 25-minute introduction to communication and active listening)

Session Time: 1 hour total

Introduction and Break into Groups (Olivia) – 10 mins

- Peer groups will include **senior generation** (those retiring or exiting the farm/ranch) and **successor generation** (those looking to take over management of a farm or ranch). **Off-farm heirs** *might* make up another group with agency/professional attendees listening in.
- Participants will divide into groups of NO MORE THAN 5 as follows:
 - Members of the senior generation, please raise your hands.
 - (Do the math—how many groups of 5 will this be?)
 - Keep your hands up, and now count off. (If there are 19 seniors, for example, form 4 groups of 5. Seniors then count 1, 2, 3, 4, 5, 1, 2, 3, 4, 5 and so on until everyone is assigned a group. Couples should ideally split up. Let folks know who their facilitator will be.
 - Members of successor generation, please raise your hands.
 - (How many groups of 5?)
 - Keep your hands up, and now count off as above.
 - Facilitators hold up group numbers (For example: Senior 1, Senior 2, Senior 3, Senior 4, Successor 1, Successor 2, Successor 3). Everyone follow facilitator to your location.
- Groups gather with facilitators. Each has notepad or flip chart for reporting back. FACILITATORS (for time’s sake) are to keep notes and report back for each group.

Facilitators:

Facilitators MUST be familiar with this document and Olivia’s guidelines for good facilitation.

__ Shelly and Olivia _____ (Timekeeper, Floater)
__ ? _____ (Senior generation)
__ Steve J _____ (Senior generation)
__ Rod _____ (Senior generation)
__ Reggie _____ (Successor generation)
__ Ariana _____ (Successor generation)
__ ??? _____ (Off-farm heirs, if enough to warrant)
__ ??? _____ (Professionals)

Other volunteer facilitators, if needed: Barbara, Glynnis, Brent, Louisa, Susanne and Roger

Group sharing (Facilitators lead): - 40 mins

- Each group member should take 4 minutes (no more!) to answer the following questions :
 1. Describe 1 - 2 issues or concerns you have about the succession process.
 2. What is your desired role in the farm/ranch after this transition takes place?
- Group takes 2 minutes to reflect back what they heard.
- Original talker takes 1 minute to reflect on how it felt to be listened to.
(Total 7 min. per person)
- Continue around the circle (Listener now answers the questions first-hand, and other group members listen/reflect, etc...)
- Shelly will be keeping time
- Facilitator is responsible for reflecting back to the speaker if no one else reflects back

Report Back: (Reassemble, Olivia leads) – 10 mins

Facilitator from each group spends no more than 90 seconds (divide the time remaining) reporting on general themes from his/her group. Assures participants that their responses will be anonymous.