

HELPING CLINICIANS HELP PATIENTS

Facilitating the
Transition into the
Clinical Learning
Environment

CPR

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Chapter 6

LEADING GROUPS EFFECTIVELY

Chapter 6 provides specific guidelines, as well tips and tools, for effectively leading groups in any setting.

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CHAPTER 6:

LEADING GROUPS EFFECTIVELY

Leading groups can be a challenging task. A successful group process is greatly dependent on the leader's facilitation skills. Being an effective facilitator is both a skill and an art; while some people may have a natural talent for facilitating groups, effective facilitation can be improved with practice and by following recommended guidelines and techniques.

The facilitator is a guide who:

- Helps people move through the group process, drawing out participants' opinions and ideas.
- Focuses not only on the group goals, but also on how people participate in the group process.
- Maintains neutrality and prioritizes what the participants have to say.

PLANNING

Planning the group meeting is just as important as the meeting's outcome. In order to achieve these goals, it is important for the facilitator to consider both logistics and creating a comfortable environment by ensuring that:

- The setting provides for optimal interaction. For example:
 - The meeting location is at an accessible and familiar place where participants feel comfortable
 - Everyone in the room can see each other, which contributes to the participants' interaction with each other
 - The number of participants (10-15) is ideal for effective discussions
- All members are engaged in discussion.
- Group participants feel safe describing their experiences and expressing their opinions.

TOOLS FOR EFFECTIVE FACILITATION

Set Expectations Appropriately: The facilitator should clarify the goals and objectives of the individual group meetings so they match participants' expectations; it is also important to be clear about what will be addressed and hopefully achieved in the meetings. After the agenda and purpose are explained, it is helpful to get each participant's feedback on what they expect or would like to achieve in the sessions.

Time Management: The agenda for the group meeting should allocate a specific amount of time for each activity in order to maintain an effective and productive session. The facilitator should guide the group and let participants know when time is running short for an activity. If a discussion takes more time than planned, it comes at the expense of another item on the agenda.

Flexibility: The facilitator should help the group members achieve their common goals and focus on their needs. Sometimes, particular topics generate unexpected lengthy discussions. If the facilitator determines that such discussions are important for the entire group, the pre-planned agenda should be adjusted as necessary, and the potential changes to the agenda should be communicated to the group.

Maintain the Facilitator Role: Facilitators should be cautious about mixing the role of facilitator with that of participant. If the facilitator has an idea or opinion relating to a specific discussion or topic, it can be phrased in the form of a question for the group to consider. Facilitators can offer resources for the group to work with but should keep their opinions to themselves. When the line is crossed, participants can be alienated, causing resentment and loss of control of the meeting.

Avoid Defensiveness: If at any time the facilitator is feeling intimidated, attacked, or criticized, they should respond calmly and reflect on the source of the issue. Once the facilitator becomes defensive, they risk losing the group's respect and trust, which is imperative to effective facilitation.

Use Humor: If there is a lot of tension in the meeting, humor can be helpful in diffusing it. Any type of humor almost always lightens the mood; it is one of the best tension relievers we have.

Value Experience: The facilitator should respect the experiences of professional group participants, as well as the knowledge they have acquired through the years, commonly referred to as "collective wisdom." Group members should be encouraged to share strategies they've developed, lessons they've learned, and best practices they've adapted.

Redirecting and Handling Disagreements: Some groups will discuss things much longer than needed, unless the facilitator helps them recognize they are saying the same thing in different words. By pointing this out, consensus positions can be summarized. The facilitator can ask a participant to summarize the points of agreement and then move forward.

The facilitator should validate the different opinions. If no consensus is reached and some disagree, the facilitator should state the situation as clearly as possible and acknowledge that some individuals handle situations differently.

- **Utilize verbal skills to facilitate conversations, such as:**
 - **Paraphrasing:** expressing to participants, in different words, the same content that they stated in order to encourage them to further discuss their thoughts and to check that all have the same understanding.
 - **Redirecting:** Passing on questions or comments to the group to help participants self-reflect and get more involved in the discussion.
 - **Providing positive feedback:** conveying appreciation and positive reinforcement encourages participants to state their opinions and makes them feel confident enough to bring up other ideas.
 - **Including quieter participants:** less talkative members of the group can be encouraged to contribute to the discussion by being asked directly for their opinions.

Summarizing: The facilitator should summarize the conclusions, decisions, or best practices identified in the group meeting. If necessary, outline the follow-up actions that need to take place, so participants get a sense of what was accomplished during the group meeting and remember the most important takeaways. In order for participants to feel valuable as a group, the facilitator should give positive reinforcement by thanking them for their good work, helpful insights, and conclusions, and their sensitivity to the comments shared by other participants.

Record Outcomes: Facilitators should consider recording key points and ideas made by participants in order to keep group progress on target; they should avoid spending too much time on previously discussed conclusions. This ensures the attention span of the group is kept at an optimal level. It is also helpful for facilitators to record conclusions about group meetings and note what worked well in the group process or what could be improved. Facilitator-documented insights provide a useful baseline for action-setting and follow-up.

Co-Facilitate with Experienced Facilitators:

Collaborating with more experienced facilitators can contribute to a more effective group process. During the period of co-facilitation, less experienced facilitators can improve their own skills and gain first-hand experience in observing how different strategies work to manage conversations.

Maximizing Facilitator's Role - In order to maximize their role, facilitators should:

- Clearly understand the goals of the meeting and the organization.
- Focus on how group members participate in the process of learning or planning, in addition to meeting the group goals.
- Draw out opinions and ideas of the group members and guide them through this process together.
- Stay neutral and flexible, don't read from a script, and maintain eye contact with participants.
- Keep the group focus on the agenda and moving forward. Pay attention to how individuals within the group may be feeling about the direction things are moving in.
- Involve everyone in the meeting by drawing quiet participants into the discussion and preventing domineering participants from controlling the session. Make sure that participants are not left behind or left out of the flow of discussions.
- Pause for questions and comments at the conclusion of an activity or discussion before moving on to another topic or activity in the group meeting; it is helpful to sum up what was done and decided after each activity, and to clear up any misunderstandings.
- Practice active listening skills and encourage all participants to do the same.
- Listen carefully to what participants are saying so you thoroughly understand the point they are making.
- When summarizing, always ask if you understood their idea correctly. Support participants' ideas and avoid criticizing anyone for what they have said.
- Keep a constructive problem-solving orientation when disagreements arise in the group.

CONFLICT AND DISRUPTION MANAGEMENT

One of the biggest challenges to effective facilitation is dealing with situations rife with multiple conflicts. The most common disruptions in the group are when participants:

- Disagree during a conversation
- Try to dominate the discussion
- Have side conversations

- Keep going off the agenda
- Put down, dismiss, or attack others' ideas
- Feel angry because they are not sure why they need to be there

While not every interpersonal difference can be resolved, it is important that the facilitator knows the right techniques and group processes for resolving conflicts and diffusing tension.

When conflict occurs, it is important to:

- Acknowledge the disagreement and tell the group that conflict is a frequent part of group dynamics and can enhance learning.
- Stay neutral and not take sides.
- Remind participants of the areas of agreement.
- Ask participants to avoid judging others, but instead respect views to further mutual understanding.
- Try to understand each person's position and the emotional impact that the situation is creating for them.
- Empathize verbally with each side.
- Acknowledge each participant's concerns and needs.
- Elicit where each participant's experiences led to the ideas expressed.
- Individual personalities can present a challenge in group discussions. Make an effort to understand why participants react the way they do and explore their point of view; otherwise, they might continue to be a distraction.
- If different points of view emerge among participants in the discussion, the facilitator should help the group find common ground among the different opinions and try to arrive at a decision that is inclusive.
- Even if participants don't agree with each other in group discussions, they should all get a chance to share their opinions and understand the reasons why a particular decision was made.
- If disagreements occur between participants in the group, identify whether there might be underlying conflicts and explore them.

- When encountering “difficult participants,” make an effort to understand the reasons behind their behaviors. At times, it might be beneficial to meet privately, exploring the source of their behavior and offering feedback, to help them understand how their behavior affects the group.
- Sometimes, a participant may dominate a discussion because they are passionate about a specific issue and have a lot to say about it. The facilitator can ask to meet with them after the meeting to hear more and, if applicable, suggest that they form a task force to further explore the issue.