

# Team Coordinator

## Job Description

- Facilitates the meetings of the Regional Management Team.
- Coordinates the agenda for Regional Management Team meetings with input from other team members.
- Reviews and approves all chapter standing rules.
- Reviews regional standing rules and job descriptions, and makes recommendations for necessary revisions.
- Maintains the region's long-range plan document.
- Maintains the regional calendar.
- Develops a support staff to assist in the implementation of her responsibilities such as chapter standing rules review and regional calendar.
- Maintains contact with appropriate staff at international headquarters.
- Maintains comprehensive records and forwards materials to successor.
- Trains her successor.

## Running a Meeting

### The Meeting Agenda

You are the new Team Coordinator and it's time for your first meeting. Your team members are counting on you to keep the meeting productive and on track. There are many reasons for the success of a meeting and some of them are easier to control than others. A large factor over which you have control is the agenda. Following is some information pertaining to agendas which you might find helpful.

**When is an agenda necessary?** Every meeting should have a clear purpose in writing so that all members of the group can be prepared. Members should have the agenda in advance of the meeting in a timeframe that is realistic. For a quarterly team meeting, a two-week to 10-day advance is acceptable.

**How are agenda items obtained?** During a regional team meeting (or committee meeting), it is a good idea to make notes of items that should be included in the next meeting's agenda. A list of action items and assignments should be sent out to all Regional Management Team members within a week or two of the meeting. Refer to this list when preparing your agenda. Also, you might want to e-mail this list again prior to the next meeting as a reminder. During weeks between team meetings, stay alert to items that should be included on the next agenda. Contact individuals to gather information. Discuss with committee chairs their activities and needs. Let everyone know that agenda items and reports are due no later than two weeks before the meeting and stick with it as

much as possible. Keep in mind that situations will arise that call for flexibility or last-minute action. Providing a preliminary agenda to team members helps catch overlooked agenda items.

**What should the agenda include?** The agenda should have a clear heading that includes the name of the group (team or committee), and the date, time and location of the meeting. Agenda items should be numbered to help participants prepare for what is expected of them. Indicate whether each item is for discussion, information, or requires a decision. Suggested time parameters can be included to keep the meeting flowing. To achieve this, you should think carefully about each agenda item. A good leader senses when an issue will be controversial and allows ample time for a healthy discussion prior to a decision. During a typical meeting, occasional reminders about time may be helpful, but each individual report or issue usually does not need its own time limit. When a committee has no report, time does not need to be allocated for it. It is helpful to note at the end of the agenda those committees with no report at this meeting.

**Who should receive the agenda?** All members of the decision-making group need a copy of the agenda; also share the agenda with anyone who may be affected by the team's decisions. Confidential issues may arise during a meeting, and while team discussions are always confidential, the broad topic can be listed on the agenda. Always save a copy of the agenda for the files.

**What is the official order for items of business at a team meeting?** Some guidelines are suggested by *Robert's Rules of Order, Newly Revised* and by the National Association of Parliamentarians, although there is flexibility in designing the order of business. The meeting should be called to order and a review of the previous meeting's minutes should begin the meeting. The next item should be "light" because an easy discussion and decision early in the agenda gives the team a positive outlook on subsequent orders of business. By the same token, end the meeting with something light so everyone leaves the room with an upbeat feeling. Issues that require difficult discussions and decisions should be tackled early in the meeting when everyone is fresh. Saving a difficult topic for the end of the meeting may make it even more difficult for the group to agree on the decision. Be aware of the need for physical movement and schedule stretch breaks. Schedule a high-interest topic after a break to keep participants alert, interested, and involved in the meeting. Realize that each meeting should be treated as a gathering that requires a unique order of business. Vary the order of the agenda, from meeting to meeting, so items receive the attention and energy they deserve. Don't allow meetings to become routine and predictable. Treat each meeting like a performance and be aware of the ebb and flow of the delivery. As Team Coordinator, remember that not all team members work in the same way. Some need to read, some need to hear, and some need to experience an issue.

**What if a team member is not present for her report?** Should a member have an unavoidable conflict, make an effort to tie her in by video, telephone, e-mail, etc. Written reports are essential whether or not the member is present. An oral review of a written report is much easier to understand than a detailed recommendation with nothing in writing. A good written report stands on its own. Distribute reports in advance to brief participants and allow them to prepare questions to discuss at the meeting. A report

containing an informational update is always appreciated by the group members. A report with a recommendation should have its justification clearly outlined for decision-makers. The facilitator can present reports for which advocates are not present.

### **Facilitating the Meeting**

To ensure that a meeting's purpose is clear, be specific about what the group will achieve, not what it will do.

### **Facilitation Skills For Regional Leaders**

Establishing a collaborative, cooperative environment, with open communication, is important as the team's meeting facilitator. Facilitation is about process (how you do something) rather than content (what you do). A facilitator is a catalyst. You, as facilitator, are in control of a group only to the degree that you help it work together. The group actually does the work; you, as facilitator, help participants stay focused so they can do the work. Your goal as facilitator is to help the group realize its fullest potential. This is true regardless of whether the meeting is to solve a problem, set goals, or resolve conflicts.

The principle of group facilitation is that cooperation among all people is both possible and desirable. Shared decision-making, equal opportunity, power sharing, and personal responsibility are basic components of full cooperation. The skills of group facilitation are based on ensuring that participants can, if they wish, participate fully in all decisions that affect them.

As a facilitator, you help members work together successfully by your attitude and your approach. Your presence should generate enthusiasm, participation and cooperation. You must create an atmosphere conducive to creative thinking, problem solving, and a feeling of mutual assistance. In this atmosphere, the group can develop solutions and ideas.

To create the desired atmosphere, you must establish a bond among team members by creating a shared goal. Look for common ground to build unity. Be supportive, responsive, and encouraging toward all group members. Maintain a positive attitude and comfortable environment throughout. If you project the kind of attitude that you want the group members to have, they are more likely to follow suit. Show an interest in what you are doing and in the people you are working with. Treat all team members with respect. Communicate consistently, clearly, and in a timely manner.

Here are some guidelines for ensuring that the group members can focus throughout the meeting:

- Understand the process you are being asked to facilitate (for example, problem solving, goal setting, or conflict resolution). Each process requires its own form of preparation.
- Know your team. Find out all you can about members of the group, their levels of skill, personalities, known problems, etc.
- Prepare thoroughly and carefully before the meeting; practice your approach until you are comfortable, including your words, your posture, body language, and eye contact.

- Prepare visual aids in advance of the meeting. Make them as attractive and neat as possible. Leave blank pages in flip charts to create new charts during the meeting.
- Understand the kinds of behavior that are productive and non-productive in group processes; practice dealing with these different types of behavior.
- Establish the ground rules and the agenda for the session ahead of time. Consider making these into charts that can be posted at the meeting. Review the ground rules and the agenda with the group at the outset of the meeting. Make sure everyone understands and accepts them.
- Be honest, straightforward, and positive in your attitude, words and body language.
- Confront concerns in a positive way.
- Stimulate participation by everyone to develop a sense of trust and understanding within the group. If you know the group members, if you have prepared carefully, and if your own communication with the group is honest, straightforward and positive, this will happen almost automatically.

### **Basic Tips for Successful Facilitation**

The following suggestions may help you feel more at ease and thereby increase the comfort level of everyone present:

- Be comfortable with the facilitation process and any specific material that you intend to share with the group.
- Outline what you want to do with the group. Then practice the process until it becomes relatively automatic and you can move easily from one part to the next (without referring to your notes).
- Be as natural as you can in front of the group.
- Use a presentation/facilitation style that is comfortable for you.
- Include the use of visual aids whenever possible to enable the group members to focus on important points. Note cards can be helpful in jogging your memory and giving you something to do with your hands. They also allow you to jot down your ideas and then sequence them in any way you choose without a lot of rewriting. You can also use slides and charts to keep yourself on track.
- Some people make pencil notations on their flip charts to remind them of specific points.
- Wear comfortable, business-like clothing that makes you look good and feel good. A neat, professional appearance can engender confidence and can give you a mental lift.
- Before you begin, check the audio/visual equipment, if applicable. Make sure that everything is working properly (overhead projector, microphone, flip charts, markers, etc.).
- Ensure that everyone can hear you.
- Briefly discuss housekeeping details (location of restrooms, refreshments, etc.).
- Identify any expectations regarding interaction within the group.
- Ensure that everyone understands the agenda for the meeting.
- Maintain eye contact with the group members. Remember the importance of body language and facial expressions.

- Use gestures and movement to express yourself. Holding note cards can disguise jittery hands.
- Give examples to clarify.
- Do the best you can.
- Enjoy yourself! People rarely succeed at anything unless they enjoy doing it.
- In short, develop your own style. Do not try to be someone else. Think about your style and design your presentation for it. Be yourself.

### **Body Language and Eye Contact**

Your body language, facial expressions and intonation make a greater impression than your words. A group may remember only about seven percent of what you actually say; but they will remember what you looked like, how you presented yourself, and how you related to them.

At some point in the meeting, make eye contact with each person in the group. This is not always easy to do. While it is natural to make eye contact with those who respond warmly to you, include all the members of the group. Get nourishment from those who respond warmly, but make sure you make eye contact with each person in the group at some point. You can minimize eye contact with people who are negative or uncooperative.

### **Positive Involvement by Everyone**

It is sometimes easy to get swept up in the energy and enthusiasm of a group and to overlook reluctant or negative participants. As the meeting evolves, encourage silent participants to share their ideas. Brainstorming sessions can be helpful in this regard. Do not be intimidated by silent or negative participants. Do not assume a person is negative just because she is silent. Sometimes your awareness is enough to bring out the reluctant participant. Do not let silence turn you off.

It can be helpful to approach a silent participant during a break and to ask her what she thinks about something that has come up in the meeting. Very often she will have ideas but is simply reluctant to speak before the group.

Do not let participants know when they have intimidated you. Smile at them occasionally; keep your cool. Do not ignore or seem to overlook them consistently.

Recognize members who are set in their ways but do not let them dampen the spirits of the group or the direction of the session. For example, you might say: "I'm so glad you reminded us of that. It's important to remember that we've always done it that way. And up until recent times, it's worked just great."

### **Conveying Confidence**

It is important to convey confidence at all times. If you do err, be the first to acknowledge it and apologize, but then move on. Repeatedly saying you are sorry, nervous or unprepared—making excuses—makes team members uncomfortable and worried and undermines their confidence in you and, in their ability to succeed.

### **Hitting the Mountain**

If you are getting nowhere in a facilitation session, you may have “hit the mountain.” That is, you may have tapped that sensitive or critical issue standing in the way of further progress. This usually shows up when a group is trying to reach consensus on goals, objectives, solutions, or tasks. An excellent clue that this has happened is that the group cannot move forward. As the group continues its discussion, team members keep coming back to the same issue. If this is a major issue, the group will not be able to get through it or past it.

There are several ways to handle this situation. First, point out to the group that the issue keeps coming up and, because it does, it must be important. Be frank about your view of what still needs to be done, about whether there is time to continue working on the issue. Be positive about it, not defeatist.

If you believe the issue must be set aside, you may need to be firm about doing so and continue with other aspects of the meeting. As facilitator, you must also realize that the group may not be able to continue unless and until the group addresses the critical issue.

If the group wants to pursue the issue and there is time for it, you may want to proceed in another way. Perhaps you can take a break and reconvene to work on it again. Another option is to form into small groups to work on it, assign a time limit then reconvene to discuss the small groups’ outcomes. Perhaps you can set a time limit for the large group and work on it only for that time period.

If you are out of time, the group is exhausted, or further progress appears unlikely, set the issue aside for further work at a later time. If it is impractical or ill-advised for the entire group to work on the issue, assign the topic to specific individuals and set a time frame for completion. Confer openly (in the presence of the group). Confirm all pertinent aspects with the group’s leadership. Get consensus from the group.

Let the group know you are interested in what happens. Offer to stay involved in the process if they feel your help is warranted. Let them know you are committed to seeing this through and that it can be resolved.

### **Dealing with Different Types of Behavior**

In a group process, each member is an individual but each is at the meeting for the benefit of the group. As facilitator, you are dealing with the group as a single entity. You need to minimize individual differences and keep your sights set on the group. The group and the benefit of the group are the focus, not the individuals who make up the group. You must be aware of individual differences and individual types of behavior but stay attuned to the group as a whole.

An important objective of any group process is to encourage productive behavior within the group and to discourage or deflect nonproductive behavior. Productive behavior supports the work of the group. Nonproductive behavior gets in the way of the group process.

You want all input expressed in a way that keeps members from going home and expressing themselves “over the back fence” (calling one another to gossip about things said during the meeting). This means you will need to redirect nonproductive energy so that each person feels as though she was adequately heard and understood. In order to do this, you need to be able to distinguish productive from nonproductive behavior.

### **Types of Productive Behavior**

Productive behavior contributes to the work of the group. Following are types of productive behavior you may encounter and should encourage.

**Initiating** activity: proposing solutions; suggesting tasks and goals or defining the problem; suggesting new procedures or new organization of material.

**Seeking** information: asking for clarification of suggestions; requesting additional information or facts; seeking suggestions and ideas.

**Seeking** opinion: looking for an expression of feeling about something from the members; seeking clarification of values, suggestions, or ideas.

**Giving** information: offering facts or generalizations; relating one’s own experience to the group problem to illustrate points.

**Giving** opinions: stating a belief concerning a suggestion or one of several suggestions, particularly concerning its value rather than its factual basis; stating a belief about the group or the process.

**Elaborating:** clarifying; giving examples or developing meanings; trying to envision how a proposal might work if adopted; stating alternatives.

**Coordinating:** showing relationships among various ideas or suggestions; trying to pull ideas and suggestions together; trying to draw together activities or various subgroups or members.

**Summarizing:** pulling together related ideas or suggestions; restating suggestions after the group has discussed them. Though a productive behavior generally, summarizing can become tedious if it is done too much. A response to the summarizer such as “I thought Carol said that very well” can often control over-summarization.

**Encouraging:** being friendly, warm, and responsive to others; praising others and their ideas; agreeing with and accepting contributions of others.

**Gatekeeping:** trying to make it possible for another member to make a contribution to the group by saying, “We haven’t heard anything from Sally yet.” Suggesting limited talking time for everyone so that all will have a chance to be heard; suggesting other procedures that permit the sharing of remarks.

**Standard** setting and testing: expressing standards for the group to use in choosing its content or procedures or in evaluating its decisions; reminding the group to avoid decisions that conflict with group standards; testing whether the group is satisfied with its procedures.

**Following:** going along with decisions of the group; thoughtfully accepting the ideas of others; serving as an audience during group discussion.

**Expressing** group feeling: summarizing what the group feeling is sensed to be; describing reactions of the group to ideas or solutions.

**Evaluating:** submitting group decisions or accomplishments to comparison with group standards; measuring accomplishments against goals.

**Diagnosing:** determining sources of difficulties, appropriate steps to take next; analyzing the main blocks to progress.

**Testing** for consensus: tentatively asking for group opinions in order to find out whether the group is nearing consensus on a decision; sending up trial balloons to test group opinions.

**Mediating** and compromising: harmonizing, conciliating differences in points of view; making compromise solutions; admitting errors.

**Relieving** tension: draining off negative feeling by jesting or pouring oil on troubled waters; putting a tense situation in a wider context; clarifying seeming differences in viewpoint.

### **Types of Non-Productive Behavior**

Non-productive behavior leads to disorganization within the group. It interferes with or prevents the group from fulfilling its task and effectively using its human resources. Those involved in non-productive behavior often do not understand or are choosing to ignore the welfare of the group; their focus is often on their own personal needs and desires rather than focusing on the good of the group. The following are types of non-productive behavior that you may encounter and should discourage.

**Being** aggressive: dominating or manipulating individuals or the whole group; working for status by criticizing or blaming others; disapproving the ideas or values of others; showing hostility against the group or the task; deflating the ego or status of others. Usually the group process takes care of aggressive behavior when it comes up. There are usually enough gatekeepers in the group to stop it and redirect its energy. It also helps to think about what the aggressive person is really trying to say when she says something hostile.

**Blocking:** interfering with the progress of the group by going off on a tangent; citing personal experiences unrelated to the problem; arguing too much on a point;

**rejecting** ideas without consideration; stubbornly resisting or disagreeing with the group. For those who like to interrupt with off-the-subject ideas, acknowledge them but redirect their concern to a later time, for example, “We’ll be dealing with that later. Save that thought and we’ll get back to you in just a few minutes.”

**Self-confessing:** using the group as a sounding board; expressing personal, non-group-oriented feelings or points of view.

**Competing:** vying with others to produce the best idea, talk the most, play the most roles, gain favor with the leader.

**Seeking** sympathy: trying to induce other group members to be sympathetic to one’s problems or misfortunes; deploring one’s own situation; disparaging one’s own ideas to gain support.

**Special** pleading: introducing or supporting suggestions related to one’s own pet concerns or philosophies; lobbying.

**Horsing** around: clowning, joking, mimicking or disrupting the work of the group. Sometimes the most creative people in a group spend lots of time horsing around. The comfort level of the group can encourage this kind of behavior, but it can still get in the way of progress by distracting the group from its task.

**Seeking** recognition: attempting to call attention to one’s self by loud or excessive talking, extreme ideas, or unusual behavior.

**Withdrawal:** acting indifferent or passive by refusing to or ceasing to participate; resorting to excessive formality; daydreaming, doodling, whispering to others; wandering from the subject. In an energetic group with a climate of comfortableness, withdrawal behavior is usually overcome.

**Playing** the devil’s advocate: expressing dissatisfaction with solutions; continually offering “yes but” responses to ideas; pointing out flaws in ideas and arguments; challenging ideas and solutions. To redirect this energy, refocus on the group; for example, “I’m glad you brought that up. Do others of you feel the same? How can we use that?”

**Constant** contributing: contributing comments to everything; “thinking with their mouths open;” tending to speak before they think. Calling on such a person encourages the behavior by reinforcing the need to be prominent in the group. But you can acknowledge the person without calling on her; for example, “Helen, I know you’ve probably got another good idea, but we’ve got to move on right now. We’ll get back to that subject shortly,” or “Helen, let’s give someone else a chance. Your ideas are so good but we haven’t heard from Mary yet.”

### Some Tips for Redirecting Non-Productive Behavior

To overcome the non-productive behavior and redirect the group in a more positive manner, consider the following suggestions:

**Confront** the words without attacking the person. Making one person in the group uncomfortable with your response or with how you handle a situation makes the whole group uncomfortable, even though you may have taken the brunt of aggression or hostility. Everyone gets edgy. Creativity slows down or stops.

**Know** what pushes your own buttons. Imagine what you would say if your buttons got pushed and how you could handle it positively.

**Train** yourself to be silent until your brain is engaged. Silence does not intimidate as much as saying something inappropriate does. Silence is often the best response but it must be a positive silence with an open, relaxed, pleasant demeanor and stance.

**Practice** standing in a relaxed, centered way with a relatively blank expression that conveys pleasantness and comfort. Be careful about smiling when responding with silence. Your smile demands a smile in return and can in itself seem aggressive.

### Tips for Regaining Control in a Group

Sometimes a group “goes crazy” and you (temporarily) lose control. A group out of control is not always the result of non-productive behavior; sometimes it is the result of very high, positive energy sweeping through the group as creativity reaches a peak. A group is truly out of control when chaos reigns. No one is being heard and no one hears what is going on. The process comes to a standstill. Here are some tips for regaining control so that the process can continue:

- If ground rules are being ignored, say: “Let’s stop for a minute. I want to remind you of one of the ground rules.” Restate the ground rule that is needed to regain control.
- When the group keeps talking all at once, stand up or raise your hand high and say: “Hold it! Just one person at a time, please. Jane, you have the floor.”
- When the conversation veers down a road on which there is no pay dirt (for example, “What I don’t like about advertising is that”), stop and say: “That’s the subject of another session. Now, back to this one.” Then restate the question on the floor.
- When the members are especially non-talkative or are offering only polite rejoinders, respond lightly (without whining) with a statement such as:
  - “Am I doing something wrong? You don’t seem to be enjoying this discussion. What is the problem?”
  - “You don’t have to be polite. My job isn’t on the line. Please help me figure out how to move us ahead on this subject.”

- “I want you to find five positive or five negative things about what we’re discussing.” Put them on a chart/board and have respondents discuss their responses.
- When nothing else has worked, stop and reorganize the room: “We’re going to take a five minute break. Feel free to use the restroom or have some refreshments. When you come back, please take a different seat.”
- Check internally to see if you are being an obstacle for communication. Your own behavior must remain productive throughout.
- If you have tried all these options and nothing works, follow your hunch. Do whatever you think will work. You have nothing to lose at this point. Trust yourself to do the right thing.

### **Achieving Consensus in Problem Solving**

One of the most challenging parts of being a facilitator will be finding a way to help groups (your Regional Management Team, choruses, quartets, etc.) solve their problems. If the problem is very serious or sticky, you may be advised to speak with the International President or a member of the Regional Leadership Coordinators.

When you are called on to facilitate a problem-solving session with a chorus, you may find that you need to relate to that chorus as a mediator, a negotiator, a facilitator, or all three. Regardless of the role you play, bear in mind that in general, your attitude toward problems will be their attitude. Your positive attitude can convince them that their difficulty has been faced and solved by other chapters and that chapters grow by working together to find solutions. Do not make them feel guilty for being in such a predicament; they would probably listen to your advice but would make a note never to ask for your help again.

Help the chorus create a specific plan of action. Follow up with correspondence, offering words of encouragement. If you have to call their attention to an error, make sure you do it in such a manner that they know you have confidence in their ability to correct it.

Never discuss a chorus problem with other Sweet Adelines. Caution the Regional Management Team members to follow suit. No chorus will share its troubles with you if you broadcast them. Honor their confidence in you and share only their good points.

### **Six Steps in Achieving Consensus**

This is a basic method that can be used in almost any problem-solving situation. It is a “win-win” method because it discourages the “win-lose” attitude of some problem-solving approaches. It attempts to establish an environment in which all participants gain. Closure and compromise play important roles in this method.

**Identify and define the problem.** This is the most important step in problem-solving. Be sure to include all sides of the problem or issue. Do not be in a hurry to get to the solution. Be sure that all attitudes and feelings of those involved have been expressed. If necessary, redefine the problem as you go along.

Be sure all members of the group, or those involved in the conflict, accept the definition of the problem. Define the problem in terms of the needs of each individual. You will be looking for solutions that meet the needs of all those involved. Everybody must feel that they have won or gained in some way.

**Generate alternative solutions.** This is the creative part of problem-solving. It is frequently hard to come up with a good solution right away. Initial solutions are seldom adequate but they may stimulate better ones.

Each person involved is to brainstorm possible solutions, no matter how wild they seem. No evaluation of these solutions is to take place at this point. If things bog down, restate the problem. Sometimes this starts the wheels turning again.

It will become apparent when to move to the next step, usually after you have come up with a number of reasonably feasible solutions or when one solution appears to be far superior to the others.

**Evaluate the alternative solutions.** This stage of problem-solving requires special care. Complete honesty is essential. All involved will need to think critically: Are there any flaws in any of the solutions? Are there any reasons why a solution will not work? Will it be too hard to implement the solution? Is it a fair solution for all?

Be sure to listen to others' thoughts and feelings. If you fail to test solutions at this stage, you will increase the chance of ending up with a poor solution or one that will not be carried out earnestly.

**Decide on the solution acceptable to all.** A mutual commitment to one solution (consensus) is essential. Usually when all the facts are exposed, one solution clearly emerges as superior to all the rest. Do not make the mistake of trying to persuade or push a particular solution on someone else. If the solution is not freely chosen and acceptable to all, chances are that it will not be carried out.

When it appears you are close to a decision, state the solution to make certain that all understand what is about to be decided.

**Implement the solution.** Determine who does what by when. It is necessary to talk about implementation just as soon as the decision is made. Keep the discussion positive. Each member must assume responsibility for her own behavior in implementation.

**Evaluate the effectiveness of the solution.** Sometimes you will discover weaknesses in the solution. In these cases, you should return to the problem for more problem-solving. All solutions should be open for revision but one individual should not be allowed to change the solution without consulting the group. Modifications have to be mutually agreed upon, as was the initial decision.

### Ground Rules for Problem Solving

It is always wise to establish ground rules for the session, to post them and to go through them with the group before you begin the problem-solving process. Ground rules help set the tone for the meeting. They should clearly establish the acceptable standards for criticism and confrontation. Some typical ground rules are listed below. You may modify these to meet your needs.

- Direct everything to the facilitator. In volatile or potentially hostile environments, this keeps participants from attacking one another.
- Do not speak for others. Speak only for yourself. This discourages participants from assuming they understand what another group member believes, thinks, or feels. It also helps participants to “own” what they say.
- Exhibit unconditional, positive regard for everyone in the room. There are no bad ideas; everyone’s ideas are important. This reduces power and influence to a level of equality among participants; it encourages creative participation.
- Make every comment an “I” message. For example, “I feel good about” or “I feel frustrated when” or “I don’t enjoy.” This ensures that participants “own” what they say and gets at the feelings behind the ideas and concepts.
- Stay on the topic. This keeps participants from diverting to less volatile, less important or safer subjects during the session.

### Maslow’s Hierarchy of Needs

It is sometimes helpful to examine a group’s problems from the standpoint of their level of need fulfillment. Maslow’s Hierarchy of Needs can be instrumental in helping you understand not only at what level a group is stuck but what must be done to allow the group to move to a higher level. According to Maslow, we must find fulfillment at each level of need so that we can progress to the next level. Most choruses experiencing serious problems are caught at one of the three or four most basic levels of need (items 1 through 4 below).

- 1. Basic needs:** food, water, sleep, health, physical well being. In a chorus environment, these might translate to very basic environmental needs such as a rehearsal hall, regularly scheduled rehearsals, etc.
- 2. Safety needs:** rules, routine, safety, security, stability, neatness and order. In a chorus environment, these might translate to standing rules (or unspoken rules), consistency in musical and administrative direction, etc.
- 3. Love and belonging needs:** a place in a group, group membership, affection, acceptance, participation, sharing. In a chorus environment, these might translate to unity and acceptance.
- 4. Esteem and ego needs:** recognition as a worthwhile human being, leadership, achievement, confidence, competence, success, strength, intelligence, usefulness. In a chorus environment, these might translate to placing well in competition, involvement in regional activities, etc.
- 5. Self actualization:** to reach one’s potential, to become the person one can be, doing things for the challenge, creativity, aesthetic appreciation, intellectual stimulation, acceptance of reality, quality rather than achievement, always changing, non-static.
- 6. Need to know and understand:** to learn for the sake of learning, a desire to acquire further knowledge, to organize, to analyze, look for relationships, leaving the self behind.

## 7. Sense of the universe: wisdom and acceptance.

### Closure

Closure is the feeling of completion attained when a process ends, a goal is achieved, or a problem is resolved successfully. It is the feeling that everything has been addressed and all that could be resolved has been resolved. Once you are gone, the group must decide what to do with the results of the process they have gone through—what’s going to happen next. As part of your preparation to facilitate, you should have a plan for ensuring that the group can proceed after you leave.

Here are some ideas for ensuring this:

- If you include brainstorming in the meeting, do something with those ideas before stopping. Categorize them at least; prioritize them if possible. Make sure the group understands what the next step is. Make sure they know you are committed to seeing that they take the next step.
- Let the group know that you are committed to its success and that you will be following up (and when and how).
- Schedule a follow-up meeting with the group before you leave, if appropriate.
- Identify tasks and assign them to individuals before you leave. Get consensus on a timeline for completing those tasks.
- Include yourself on the timeline (phone calls, additional meetings, etc.).
- Get a commitment from the group that the information it has generated will be written down and distributed (within a certain time frame) to everyone, including yourself. As soon as you get home, follow up with a letter confirming your interest in the group, what they have done and what they need to do, and also confirming your continued involvement with and commitment to them. Make sure you build the group into your schedule so that you have sufficient time to follow up with them.

### Monitoring Long-Range Plans

What is strategic planning? Your region probably has had several goal-setting sessions. What’s the difference between the two?

Goal-setting often bogs down. Goals were set, a “philosophy” was hammered out, and then the facilitator went home. Sometimes the team returned invigorated, ready to get going, only to find that the strategies or means to achieve goals were not in place. Also, the goals were so rigidly defined (“200 new members by April 30” for example) that discouragement sometimes sets in when the region could not meet that goal. Goal-setting can still be a valuable tool, but the process has been refined as other techniques and theories have joined the mix of current thinking on how to use the future to determine what our actions should be today.

Strategic planning will give you the tools to move forward from a shared vision. The “how-to” part of planning is built right in through the strategies that are adopted each year for implementation.

So if you have decided that not just any path will do for your region, you are ready to move into long-range strategic planning.

### **Not a one-time exercise**

The nature of long-range strategic planning does not lend itself to a one-time rhetorical exercise. Strategic planning gives your region a plan that's alive, that helps focus programs and services to member needs. Financial stability is maintained because studies of strategies are made in an orderly way, and new and existing programs are measured against the question: does this program advance one or more of the goals of our region?

A strategic plan is constantly changing. Expect your planning document to become dog-eared from changes. While the team bears responsibility for development of a well crafted strategic plan, you as Team Coordinator assume the primary responsibility for monitoring the plan. Monitoring includes:

- A review of the annual regional calendar to determine what changes need to be made to align the current operations with the strategic plan,
- Development of a communications plan to inform all members of the new direction, changes and the resulting benefits,
- Scheduling time at team meetings at least annually to review and update the strategic plan.

Eighty percent of the goals and strategic plans that are written are never used. Strategic plans take resources over and above the ones used for the short-term activities of the region. This is why most plans are not implemented and end up as “good intentions.” This is also why your actions are important to the success of the long-range strategic plan.

### **Getting started**

To keep the planners on track and to allow the regional leadership to fully participate, consider bringing in an outside facilitator such as a member of the international faculty.

Be sure to give yourselves plenty of time. A one-hour shot during a regional weekend is not recommended! Your outside facilitator can talk over your needs with you and help set up a productive schedule.

### **Strategic Planning Process Outline**

#### **I. Pre-session work**

##### **A. Assess regional needs. Assessment tools include:**

1. Member surveys
2. Membership data
3. Financial data
4. Competition scores
5. Focus groups
6. Current calendar of events

##### **B. Complete analysis of environment**

##### **C. Choose facilitator and recorder**

- II. Strategic planning session(s)
  - A. Visioning
  - B. Formulate mission statement
  - C. Identify core values
  - D. Draft goals
  - E. Develop strategies
  - F. Develop check points
  - G. Develop an implementation plan
  
- III. Post-session work
  - A. The written strategic plan
  - B. The communication plan
  - C. The action plan
  - D. Implementation management

### Definition of Strategic Planning Terms

**Mission Statement:** A precise, concise and inspiring statement declaring the fundamental purpose for which the organization exists. Who we are and what is supposed to happen for whom as a result of what we do?

**Goal:** A timeless, unbounded statement that describes the condition or attitude that we seek to attain.

**Check points:** Measurable, attainable milestones to achieve by a specific point in time on the way to accomplishing the goal.

**Strategies:** How to organize and focus resources and actions to maximize effectiveness and efficiency in achieving goals.

**Action Plan:** Define how a strategy will be implemented and make progress towards the goal. Include specific actions to be taken.

**Commitment:** The ability to set a specific goal and follow through daily long after the inspiration of the moment is passed.

### So we have a plan: what's next?

Go for a “quick win.” First, select a strategy that is a “quick win,” one that’s easy and quick to achieve and that can demonstrate that the group is on the right track and that things are happening. The strategy should also inspire, so a revision of Article II, B, 3, a, (2) of your standing rules probably should not be your “quick win.”

### Promote, promote, promote

- Keep the plan in front of the team.
- Structure the agenda of each team meeting so that some of the meeting will deal with the plan.
- Encourage committee chairs and team members to report their activities showing how they relate to the strategies and goals of the plan.
- If the plan is not to molder away in a desk drawer, it needs to be present at each meeting. Also, specify one meeting of the team when the plan will be reviewed in depth.

- Make sure that regional members are involved. The management team does not have all the answers. Establish a task force or study group to take on one of the strategies and make recommendations about its implementation.
- Put the mission statement, goals, and the strategies being worked on everywhere: in your regional newsletter, on your Web page, in your roster, etc. Use catchwords and slogans that refer back to the plan. Report, no, crow about progress regularly. Blow your own horn.

### **Overcoming obstacles to the plan**

- No plan is perfect. It's meant to be a living, breathing document. Therefore, it can be adjusted if there are parts that just aren't right for your region at the moment.
- Is the plan too ambitious? Remember this is a long-range strategic plan. The strategies for obtaining your goals are meant to be spread out along a three- to five-year time frame. Slow down. Nibble away at your plan rather than trying to digest it in big gulps.
- Your team doesn't "get it?" Educate them. Continually bring the plan to their attention. They can't support it if they don't know what it is. Your plan should be vibrant and alive; a plan that's long-range, yet filled with the passion of today.

### **Network**

Many regions have already made long-range strategic planning an integral part of their management so that musical goals can be achieved more readily. If you have questions, use the Sweet Adelines network. Help is only a phone call or e-mail message away.