

## **Multi-Agency Facilitation Webinar**

**Moderator: Julie Marcy**

**February 26, 2014**

Julie Marcy: I have right at 1:00 so why don't we go ahead and get started. I'm Julie Marcy with the ERDC Environmental Lab and I welcome you to our multi-agency facilitation webinar.

The facilitators exchange is a joint endeavor between ERDC and the Institute for Water Resources Public Participation Community of Practice. Our session today will be on facilitating multi-agency meetings. I see we have participants from across the Corps, so it looks like we have a nice cross-section and I welcome all of you to our session.

The series of web meetings is intended to share facilitation and collaboration topics of interest and to provide an informal venue for exchanging best practices in facilitation. We record the meetings and archive the files on the Facilitator's Exchange Web page at the address showing on the introduction slide.

Following the presentation, we'll accept general questions that you might have on facilitation or if there's a facilitation best practice that you want to have once we've had a chance to ask Therese about the topics she presented.

And with that, I'll tell you a little bit more about our great speaker today. We're very fortunate to have her. Therese O'Rourke Bradford is a facilitator and Chief of the South Coast Branch Regulatory Division in the Los Angeles District. Therese worked for many years as a partner with the Corps before joining the Corps in 2008. Her work is focused on internal team building, external partnering, and efficient meetings and processes.

She created a quarterly workshop for other agencies and consultants to better educate those involved with the regulatory program. She has experience working with other federal agencies to include the Forest Service and the Fish and Wildlife Service, plus experience with The Nature Conservancy and many others. Therese was certified as a facilitator by the Newton Learning Corporation and she's taken facilitator and leadership development courses over the past 25 years.

She speaks several languages and has facilitated meetings in Indonesia, Brazil, Mexico, Guatemala, and many other countries. So I think you can see that we are very fortunate to have Therese with us today. Some additional information in Therese's bio can be found on the bio posted on the Facilitators Exchange Page and we'll also have a PDF of the PowerPoint that she's presenting today.

And with that, Miss Therese, you should have presenter rights and may take it away.

Therese O'Rourke Bradford: All right. Well thank you, and I appreciate everybody being on the phone and having this discussion about facilitating multi-agency meeting. I also named this How to be the Secretary of State because as a facilitator of multi-agency meetings, you really have to have some ability to facilitate and negotiate and really be able to bring people together.

Also, you'll see on the front is an area of the LA district and I decided to use this presentation to show those of you across the country all the beauty of Southern California. I know people think of the beaches or LA or maybe the fires as being what LA is about, but the LA district really has a great biodiversity and lots of pretty pictures. So in addition to the facilitating discussion, you'll see pictures of Southern California.

So I'll talk first about facilitating in general and then I'll utilize some specific examples of processes that I've been involved with over the years. I find that it's really important to meet with the organizers, the meeting organizer -- whether it's the colonel or floor supervisors or whomever the decision makers are for the meeting -- and determine what the meeting is for, who should be at the meeting, how to structure the meeting, where the meeting should be held, when the meeting should occur and really why the meeting is occurring.

This seems simple and very basic, but this is to me the heart and soul of making sure that the meetings that are going to occur actually have a process, are driven to a solution, or whatever the outcome is going to be, and gets everybody on the same page for the meeting.

So what the meeting is for. My experience is that if this isn't determined and if there isn't a lot of information or work done regarding the type of meeting, it turns into an informational meeting. Informational meetings are great, they're valuable, and a lot of meetings are thought of to be decision-making meetings, but end up not being decision-making meetings because the prep work wasn't done ahead of time. And so it turns into a non-decision meeting or by default an informational meeting.

Sometimes it's a combination of informational or decision-making meetings, but it's really important to be very clear about what the purpose of the meeting is. In order to be clear about that and especially with multi-agency meetings, it's important to identify who the decision makers are for each agency or for each component within an agency. And I'll go into detail with that with my examples. And what decisions are to be made and who's going to be making those decisions.

Within the Corps, we might have the Colonel as the decision-maker, or maybe a division chief, but with a multi-agency meeting, it's really important to know the style of the decision maker, the type of decision that needs to be made, and how the leadership really interacts with that decision maker.

And then who should be at the meeting? For multi-agency meetings, a lot of times you'll have a varying degree of grades or decision-makers at meetings. For example, the Fish and Wildlife Service, when we have mitigation banks in our agency review a team meeting, we'll usually have people from GS-11 to GS-15s at the meetings. And usually the GS-15s or GS-14s are decision makers and the others may be staff.

And so there's not necessarily the same level of decision-maker in the room so it's important to know if the person at a GS-11 level had that delegated, the ability to make that decision.

So who are the influencers? With the different agencies, there may be people who are not in designated leadership positions who are actually more influential in making decisions than, say, the leaders themselves. It's important to note who they are and what their role is in the process.

And then who are the decision-makers? In the Forest Service, it's usually a Line Officer, so a District Ranger or a Forest Supervisor. Within the Fish and Wildlife Service -- at least the service that I worked for -- it was mostly the Assistant Field Supervisor. Within the Corps, it seems to be whoever the Senior Project Manager, or whatever Chief is there. So it's important to know who is a decision-maker and whether or not they'll be at the meeting and whether or not they've delegated the ability to make decisions to the person attending.

And then how do we accommodate all of those who have a stake in the decision? Are we able to include all the people in the different agencies or are there representatives who can adequately represent people? It's important to know how those folks are going to be accommodated.

And then how to structure the meeting. So I've worked for four different federal agencies and what I've found is even though everybody worked for the federal government, it is a completely different experience within different agencies. And even within different units with the agencies. For example, with the Forest Service, District Rangers generally work with their own districts to make decisions and that's at the GS-12, GS-13 level.

Within the forests themselves, those are usually made with the Forest Leadership Team and the Forest Supervisor who's usually GS-14 or 15. Within the Fish and Wildlife Service, it can be extremely variable. So it's just really important to know who within the agencies we should be working with and what can they do for the meeting?

And then what do the individuals need to function at their highest level at the meeting? For example, when meeting with folks from the Fish and Wildlife Service, it's important that their needs are met regarding how is the biology going to be taken care of? With managers they want to know how is their project going to be implemented and are they going to meet their deadline. So what do those folks really need to know in order to function at their best at the meeting?

And then how do we address multiple decision-making layers within an outside organization? And I'll use one of my examples to talk about that. And then how do individual groups we're facilitating interact? Within an

organization, there may be a push or pull within different individuals or groups.

And then where should meetings be held? A lot of times it's just held wherever it's most convenient and sometimes it's at one agency or another. And so, you need to determine based on how the work - the entities work together whether it should be held at an agency location or if it should be at a neutral location. And if you have the logistics to make that work, what kind of support you need for the meeting, whether or not the agencies need to be on equal footing when they're meeting in a neutral location.

And then how to use space for facilitating decision making and I'll talk about that in the next section. And then when should meetings be held? And there's an old saying of "Arriba, abajo, al centro, y dentro!" of course when you're knocking back tequila or something, but it's a really good reminder of when meetings should be held.

And when dealing with multi-agency meetings and really high profile issues, it's important to manage up, make sure the people above you know what's going on. Managing sideways, making sure the people who are involved in the decision making are working together. Managing down, making sure within the organization are on board and then managing yourself to make sure that you as a facilitator are maintaining neutrality and just being the process person.

And then making sure people are informed and engaged and aligned. And again, depending on what the facilitation needs are -- and my examples will show an example of a one day meeting versus a two-year process. And then keeping people abreast of process and cost and timelines and decisions and policy and how they do that.

And then why are we meeting? A lot of people will come to a meeting just because they'll come to a meeting, but it's really important I think to have people really buy into this, to have a set purpose with a defined outcome. Because people will come to meetings, but will they come to the next meeting? And I think if you have a meeting where you have a defined outcome, then people would keep coming back.

And the way that I deal with meetings and with people in situations is if there's something going on that needs to be addressed, I tend to go right towards it and address the situation right on. And - I'm sorry, was there a question?

(Julie Marcy): I don't think so, Therese.

Therese O'Rourke Bradford: Okay. And so just to come up with how you're going to be dealing with people who are taking the meeting sideways, it's important to figure that out and know what your style is and be able to address that.

And then using facilitator techniques to engage difficult people or people who are taking the process sideways, either by getting them to assist with the process or creating decoy processes or others, and I'll talk about that with my examples.

So my first example is regarding facilitating the final segment of the Continental Divide National Scenic Trail. And this is a trail that goes from Canada through the US and to Mexico and it was something that had been completed except for one small portion. And this one final segment had been stalled for 15 years because of peoples' inability to agree on where it needed to go.

And the groups that were pitting themselves against each other were environmentalists versus hikers and biologists versus cattlemen. And the three Forest Services districts who were involved in that were all in disagreement of where it should go. And the regional forester who hired me told me she hired me specifically to get this done and to get it done. So I was under pressure and the others really had no incentive to do anything other than what they had been doing before.

So what I did was I let them know that I would be making a decision and that this was their opportunity to come together and work through the situation. So I gathered everyone in the room -- and there were about 40 people -- and I set the stage. And I told them that it was time that we - that the Forest Service made a decision, that I knew that there was a lot of angst about where things should go, and that regardless of what their stances were, that by the end of the day I would be presenting something to the regional forester.

And it was their opportunity to work together and come up with something. And I had no idea how this was going to turn out but I thought I would just hope to get these folks together and get them to come to a conclusion. So at first, everybody was squawking and people were very angry and they didn't want to be put into a box like that and they were just treating this like this was the end of the world -- that this trail would go in where they may not want it to go in.

And so by setting the stage, I asked them to consider what we were talking about. And that it was a trail and although it was a very big deal and it was very important, it didn't compare to something like a nuclear holocaust. And if they could try to keep that in perspective and know that by the end of the day we'd be making a decision and that this was their opportunity to have input.

And I asked everybody to do what they could to listen to the people who had opposing views and see if they could accommodate that other person.

So I broke the segment of the trail that needed to be done into six different segments and I had six different maps on the wall and split the groups and had one representative from each stakeholder in each group. And then I asked the Forest Service folks to help facilitate and not influence the group and then I went around and just kept making sure the Forest Service facilitators were actually facilitating and not directing.

And it was about six hours later that all of the groups came together and, after doing their small group work, presented what they had come up with. And there was a small portion that they all had different ideas on and I had them work together again and they came up with a route. And by using that technique of bringing small groups together and then having them create a solution and having a deadline set where they had to function and they had to perform or else they'd have to live with the solution, it really pulled it all together so that they were able to come up with that solution.

And they did. They surprised themselves. They agreed on I'd say 85% and at the end of the day they had agreed on 100%. And again that was really just setting that stage, having small group interactions, and just holding the space so that they felt the pressure to create a solution and that they worked together to do it.

Another example is the Southern California Conservation Strategy. And this one is extremely complex. And whereas the other example regarding the Continental Divide Trail was a one-day facilitation, the Southern California Conservation Strategy was a four-year facilitation. The Center of Biological

Diversity sued the Four Southern California Forests for violation of the Endangered Species Act.

And so all activities on all four forests, where there are 24 million people, came to a complete halt. And so there was huge pressure to turn this around really quickly. And the four forests had to work together under a settlement agreement from the Department of Justice and had to consult with two Fish and Wildlife Service offices on all activities and 127 species on 3.7 million acres. So that was a massive undertaking.

And the court designated the time table and luckily we did get an extension, but it was a massive undertaking and the four forests did not work well together and that is an understatement. And the research branch was involved, which is another aspect of the Forest Service. And there happened to be no trust between the Forest Service and the Fish and Wildlife Service.

The Forest Service thought that Fish and Wildlife Service staff had gone behind their back and gotten the Center for Biological Diversity to sue them because the Fish and Wildlife Service wasn't getting what they wanted. And I don't know if that happened or not, but that was what their story was and that created huge distrust between the agencies.

And the regional office was micromanaging this because they knew that not only do they have a court issue and a court settlement that had to be implemented, but that the forests were fairly dysfunctional.

Julie Marcy: Therese, this is Julie. I have one question that's come in. The question is if you had a group of non-government stakeholders offering advice, how did you design the process to avoid (FOIA) violations and did you cede your decision making authority to the group?

Therese O'Rourke Bradford: Okay. We did not give the authority to the group and this was actually before the whole Hillary Clinton thing years ago...

Therese O'Rourke Bradford: Before the whole (FACA) issues years ago, but how we set this up was that it was a public meeting. I did advertise it so anybody could participate, you know, they could view it. And the people who were at the table who were actually working on it were not giving advice to the regional forester. It was just a kind of a workshop for the public. So I just put it out there for the public.

Julie Marcy: Thank you.

Therese O'Rourke Bradford: So I believe even though it was pre-(FACA), because we did it publicly, it wouldn't violate (FACA). Okay, anything else Julie?

Julie Marcy: No. That's all that's in so far.

Therese O'Rourke Bradford: Okay. And then the different groups that were involved with the Southern California Conservation Strategy were very complex. There was the SCCS leadership team, which included the regional office, the four forest supervisors; the two FWS field supervisors, the FS research director, and the regional office environmental conservation director.

And then there was the Forest Supervisor Group of the four forests who were kind of known throughout the country as being nonfunctional. And then the 4 Forest Leadership Teams, which is about 80 people from the different forests and then the forest biologists that comprised about 10 different forest biologists from the four different forests. And then the SCCS team, which was

my small team, which included a core group of about six of us and then one person from each forest on the team, so ten in total.

So with the SCCS Leadership Team, it was important that they knew that the process was on task and on target and people were working together. And so I would travel up to San Francisco every three months and give a presentation to them about what was happening and what the issues were. And one of the things that I did as a facilitation technique was instead of going up and having a presentation all planned with a PowerPoint, I started every meeting with questions, "What are the questions that you want answered before the end of this presentation?" And we brainstormed and listed all of those questions so that when they left that they felt like their questions were answered and that they didn't need to micromanage so much. So that was one facilitation technique that really seemed to work well with the higher level leadership team.

With the forest supervisors, this was probably the most difficult group. There was always a power play going on and every year or so there was another new person. They had turnover, so there was another forest supervisor in the mix. So it was a constant educational process and buy in process and a power issue with the forest supervisors. So I met with them every month. This was a group that I met with off site because they couldn't agree on where to meet and they wouldn't meet in each other's space.

So I had to come up with a United Nations territory where nobody had any influence. So that was by far the most difficult group. Also, because the four of them were ultimately the ones who would make the decision, we had to come up with a decision making framework. And we spent many years coming up - at these monthly meetings coming up with a decision-making framework.

At the time I did think we were coming up with a decision-making framework. But this ended up being almost a decoy document. It took their time and energy investing in this document and it actually allowed the Forest Leadership Team, the forest biologists and the SCCS team to actually do the work that needed to be done while the forest supervisors were focused on how they were going to make the final decision.

So it was kind of a concurrent process of getting the work done while the forest supervisors dealt with their power struggle.

And then the Forest Leadership Teams, again these teams - there were four teams and we would go to the different forest teams and we would talk with them about the issues. We would facilitate their role in the process and again, this was a lot of bringing people up to speed, bringing new people into the process, making sure folks were on board, because they were the ones who were actually going to have to implement this in the end.

And they were actually fairly easy to work with, standard facilitation techniques were used until the very end, when all four leadership teams came together. The forest biologists also worked with Fish and Wildlife Service biologists and that was full of angst because of the issues regarding the lawsuit. And what we found was that people couldn't even speak civilly to each other. And every time somebody would use a word like 'significant' or 'critical', the one group or the other would get their hackles up.

And so we actually had to come up with a dictionary and we had to agree to not use certain words. And we actually came up with alternative words -- an alternative language -- that everybody could agree to. And in the final product,

we used that new language to identify and use that language to make things go forward.

And for those of you who don't work in the ecological area, critical habitat is something that - if the Fish and Wildlife Service says 'critical habitat' then the forest service -- this group -- would get their hackles up because they didn't want additional critical habitat on the forest. And if the Fish and Wildlife Service used the word 'significance,' then the Forest Service biologists would get upset because the NEPA implications of significance.

So those are a couple examples of the words that were banned. They were just taboo and we had to come up with something that was meaningful to folks, to all of the biologists in the Fish and Wildlife Service and the Forest Service and move ahead with that. But it took us quite some time to actually get our language straight so that we could actually work together for a solution.

Julie Marcy: And Therese, this is Julie again. One other question's come in. When you were working on this SCCS effort, did you have any involvement by tribal members?

Therese O'Rourke Bradford: We actually did tribal consultation. We have many tribes throughout Southern California and so each Forest Leadership Team and each has an archeologist and a tribal person per leadership team. And so the leadership teams would then get the information out to the tribe. And then we did have larger meetings for all the tribes so that they would understand what we were doing.

Julie Marcy: Okay, thank you.

Therese O'Rourke Bradford: Any other questions?

Julie Marcy: That's all so far.

Therese O'Rourke Bradford: Okay. And then also, because this was an area that covered most of Southern California and the regional office up in San Francisco, we did a lot of our meetings in person. But we did a good number of them virtually.

The SCCS team was a virtual team. Our core team was based in San Diego, but because we had members from all the different forests -- one in Santa Barbara, one in San Bernardino, and one in Los Angeles -- we met as a virtual team to keep that moving. And it was just because of the driving and all that, we did as much as we could with virtual meetings and a centralized database and centralized system where we stored our information.

And then the Department of Justice we also had to be involved with them and also the Center for Biological Diversity as the group that was suing us. So the way that this evolved over time is that the forest supervisors eventually came together in the end. There was trust that was built with the regional office and so they let go of having to micromanage things.

At the very end, we were just about to come to conclusion on how we were going to make decisions and one of the forest supervisors said, "No, I can't do this; my entire team has to be involved." And so instead of eight people making a decision, he insisted that his entire team be involved, which caused the other forests to insist that their entire team be involved. And so for our final documents, which was about 150 pages, we had about 100 people involved in going through line by line, word by word, and buying into that process.

And so what we did was we met offsite and we got a hotel room with breakout sessions and we had the Fish and Wildlife Service and the Forest Service there and we went line by line through everything. We used facilitation techniques of small groups and then bringing them back to the large groups. We had large group decision making and the - after a week had gone through the 150-page document and had buy off by 100 people.

And then this was implemented by those 100 people on the forest and the lawsuit was lifted and the Forest Service came into compliance with the Endangered Species Act and then all four forests were able to function again and include what we had created into their forest plan revision. So that was the SCCS story.

But the big thing that I learned from that was the decision-makers, it's really important to know that - their style of decision. And there are some people who are decisive, other people are collaborative, others who are analytical and I think most of us have some combination of the above. And the decisive ones -- and we had one who was very decisive of the four forest supervisors -- wanted instant answers and instant deadlines and instant product.

And then there was one who was very collaborative and wanted to work with his staff and would never commit to anything until he had checked with his staff. And then another one who was very analytical and wanted data and wanted time to process that data and to think about how she wanted to move forward. And then the fourth forest supervisor was kind of a combination of all of the above.

And so as a facilitator, it was important that for the collaborative and the analytical types in particular that we did some pre-work. So for the highly analytical one, I made sure that she had all the data that she needed before the

meetings in order to be able to come to the meetings to make a decision. For the collaborative one, I spent more time with his leadership team to facilitate the discussions and get him comfortable enough making a decision.

As far as the decisive one, I actually worked with her Forest Leadership Teams to make sure they weren't left out because she was so decisive. And then the fourth one, who was kind of a combination of all of the above, she was actually the easiest for us to work with because she actually did do collaboration when appropriate, analytical when needed, and decisive when needed. But as a facilitator, it was important to make sure that I took into account all of these different styles.

And then for the decisive one, it was very important for her to have deadlines and to meet those deadlines. And if we didn't, then it would really undermine her willingness to work with the others. And then during meetings, to take into account the different styles of the decision makers, before we made any decisions, we would take breaks. And the breaks would allow the collaborative and the analytical types to sit and think - actually the analytical type to sit and think and the collaborator to phone a friend and get some feedback to what the collaborator wanted to do.

So during the meeting - and part of the facilitator technique is to structure the meeting for the type of decision-makers that we have - what I found is the majority of groups are diverse and so it's important to create the situation so that people can get the information as they need it based on their styles and then allow, even within the meeting, time for people to ingest that before they make a final decision.

And I found that if I don't do that, then the decisions that are made don't stick. And what we want is a decision that's a true decision and that people are fully

supporting. So it's important to really create a space and hold that space for all the different decision makers to be involved and to support the decision.

All right, now back to the Corps. Facilitating regulatory permitting -- and I said that most of the pictures come from Southern California, but this one didn't. And this one is just, you know, what people think about with regulatory permitting I think. And what we've been doing in Southern California is getting away from our desks and going out into the community. What we found - I've been with the Corps for six years and I have a lot of new staff.

And what we found is that we get a lot of applications that are very poor. People don't seem to know what they're doing, our application process is not that clear, and there are some consultants who think they know a lot. And whether they do or not I'm not sure, but they at least believe they do. And so what we've started doing -- and this is more of an informational session - informational facilitating -- is we have been doing quarterly training sessions that is held by Corps staff, and this is to update the public.

Our first one was regarding nationwide permit and the second one was standard individual permits and our most recent one was on the mitigation rule. And what we do is we have our staff choose a topic and present that topic and it allows for our junior staff especially to learn more about the process because the best way to learn something is to teach it. And so they have been learning their job better by doing these presentations, also gives them some presentation skills.

And it helps us to update the public, educate consultants, and coordinate with public agencies. And it helps us to facilitate change. So not only are we facilitating the meeting, but we're facilitating change within our permitting process.

And then another example, the Nature Conservancy Program with Mexico. Just as we had to develop a language -- new language -- with forest biologists where we could have language that wasn't offensive to people, what I found is that language is so critically important in dealing with other countries. So if you're dealing with Mexico or any of the other countries out there, knowing the language, not joking in the language if you're not really good in it, is pretty important. Knowing different cultural issues, how people receive data and how they manage data.

When traveling to Mexico or Guatemala or Indonesia, there is usually gifts that are exchanged and that can be an issue for a federal government. And then coming up with structured agreements that don't violate any kind of bilateral process of other kind of higher level agreements.

And then just in general, the group facilitation, I think it's the most important thing is to set the context and hold the space for the meeting. And knowing, you know, what, who, how, where, when, and why that I talked about at the beginning is critically important. Whether you speak the language or whether you need to create the language in English for other agencies, it is so important to know the agency's culture, the agency's language, and how the agency makes decisions, because it is different for every agency.

And then knowing how group problem solving will work. Do you have the right people in the room? Can they make decisions? Can they really pull together? And as a facilitator there are different techniques to use for group problem solving that again is critical that we have the right people in the room. And just being in service to people and leaders in the process and keeping that in mind as we facilitate either hour long meetings, a day-long meeting, or a four-year process.

And with that, any - are there any questions?

Julie Marcy: Yes, if anyone has any questions for Therese, you can either ask them verbally or you can type in using the chat. I'll be monitoring that. And remember, if you put yourself on mute, you may need to unmute yourself.

(Steve Dunbar): This is (Steve Dunbar) in Boston. I'm impressed with the forest case. It sounds like a total mess that you solved. But I'm - I didn't catch whether you - did you do any research up front on the folks that were going to be in that meeting? I mean it sounds like a real tough nut to crack with the personalities that you were dealing with. I was just curious if you knew you were getting into that ahead of time or you had to make some decisions on the fly to try and solve that problem.

And what training, if any you used, or was it just, you know, your user experience facilitating?

Therese O'Rourke Bradford: Regarding the situation with the Forest Service I was actually on a detail to the four forests. I knew that there was at least one problem player in that group, but I did not realize the depth of the dysfunction. And the first meeting I had with them was a complete disaster and I speak to you of the successes today, but it was based on a disastrous first meeting where people were literally screaming at each other and threatening each other.

So what I basically did was meet with them all individually, try to figure them out, and let them know that it was just going to cost them more time and more money if they weren't able to work things out. And then the regional office, who loosely oversees the forest supervisors basically threatened them and told them if they weren't able to work this out, they would all be removed.

So there was significant pressure from the regional office to work together and get this done. But I had no idea it was so dysfunctional. And so also, what I had asked them to do because they didn't trust the team that had been pulled together because we were all from the outside, I asked them to give us one person per forest to actively work on the team 100% of their time, and that way they would have a representative. And they would know that they were being represented and that that person would be their liaison.

And so that seemed to increase their comfort level, although they didn't like losing a person. And what I had those four people do was to take an extensive, intensive facilitator training course by Newton Learning. And we all learned basic facilitation techniques and they became the facilitators with me of the process on their forest.

Julie Marcy: Therese, this is Julie. That is a great segue for another question we had. An inquiry came in for both your Mexico and California examples. Were you the lone facilitator or did you have a team of facilitators working with you? And if so, about how many?

Therese O'Rourke Bradford: Well with the Forest Service example, I was the lead facilitator, so I was the one who was responsible. I did get the four forest representatives trained in facilitation. I'd say two of them were pretty good at it and two of them weren't. And so for every time we went back to the forests, I would be the facilitator for the forests.

But as you know, there are more meetings and more meetings. So I was the official one for the official meetings and then I had the forest representatives working with people individually and in small groups on their forest

facilitating the process and the discussion. So it was an entire team but I was leading the team and the main facilitator.

Julie Marcy: Got it. And how about the Mexico example? Was that a team or how did that work?

Therese O'Rourke Bradford: Yes, with the Nature Conservancy, there are many times that we did meetings with Mexico. And so there were times that I was just part of a team and other times I was the lead facilitator depending on the situation.

Julie Marcy: Okay.

Therese O'Rourke Bradford: And usually with Mexico or any of the other countries, I like to - when I'm facilitating - I like to be a co-facilitator with someone from the host country. Because even though I do speak the language, there's always subtleties and other things that I don't pick up so I prefer to be a co-facilitator.

Julie Marcy: I just had another one come in. How do you convince people within your own organization that interagency meetings need to be strategically planned and facilitated to be effective? They shared that often in their case they just make an agenda and then try to work through it the next day.

So what have you used to try to help indicate the importance of strategic planning and facilitation for key meetings with other agencies?

Therese O'Rourke Bradford: Well we have a number of different levels of meetings and the higher the level, the more people seem to be willing to have facilitators. We have monthly meetings that are facilitated by the Department of Fish and Wildlife for pre-application for regulatory, and that is facilitated by the Fish and Wildlife Service, the State Fish and Wildlife Service.

And a lot of times what I find is that we're facilitating from behind the scene because the meeting will go off track. So when we're not the ones leading it and we're just participating in it, we try to work with the other agencies to have the agenda set, but also lead from the sidelines or facilitate from the sidelines to keep things moving along.

For the higher level meetings, it seems like people are interested in having that kind of neutral facilitation just because I think people realize how much time is wasted if the meeting doesn't go well.

Julie Marcy: Understand. And that sort of enhances another comment that was sent to everyone that it's also critical to find the right facilitator for the particular issue or interagency team or group.

Therese O'Rourke Bradford: Right, that's really critically important and as a facilitator, I think it's important to be able to be willing to step down. There have been a number of times when people have focused on who I use to work for instead of what my skill are in facilitating. They fear that although I work for the Corps, I used to work for the Fish and Wildlife Service would have a non-Corps motive.

And so I have to recognize that even though I feel like I can facilitate no matter what, peoples' perceptions may get in the way if I'm the facilitator. So finding the right facilitator and that facilitator, even if they think that they're the right person for the job or have skills, peoples' prejudices may get in the way and may slow down the process.

Julie Marcy: Understood. Another question that came in for the Forest Service example, what did the facilitation training that you did for them consist of and what

were the indicators that showed you that perhaps two of those individuals were still not the best facilitators after that training?

Therese O'Rourke Bradford: Well the training that we took was very intensive. It was three weeks over four months. So five days, so a total of 15 days of intensive facilitator training where we received some training and then we did a lot of presentations in front of the group that was taped and people gave us feedback and then redid the facilitation. So it was a constant feedback mechanism from the trainers and the other people in the group.

And what let me know that it wasn't working with two people is where one person basically had a complete anxiety attack about facilitating after that training, so I - that wasn't going to make him do something so uncomfortable for him. And then the other person was so negative about facilitating and the whole process that I knew that she wouldn't be the right person to communicate what we needed.

But the other two were truly outstanding and, you know, did a really good job.

Julie Marcy: Okay great. One other question, have you ever had an experience -- and it sounds like you may have had one that you mentioned -- an experience where the meeting got totally out of hand and then how did you get it back on track?

Therese O'Rourke Bradford: Oh I've had many meetings that have gotten way off track because of the emotions involved. So with the example of the forest supervisors, I just, you know, I let them - I let them have it out and then I just took - I used breaks. I have people move around. I find when people are sitting in their position that people who tend to not move off their position, it's best to get them to physically move and sometimes that physical movement can get them to at least shift a little bit.

But just reminding them of what the issues were and letting them know that they were all going to get what they needed in the end if they were willing to work together. And eventually they did but it was I think quite painful for everybody.

Another example, Monday night I was at a public hearing and it wasn't our meeting. One of our applicants was hosting a meeting presenting to the community about a mitigation bank that they had proposed. And it was removing a golf course to put in a mitigation bank and there were 300 angry opponents to it. And for an hour and a half, the room built up in angst.

And they took a break and then I - although I wasn't facilitating, I just came in, introduced the Corps, let them know that we were listening, let them know that we heard what they were saying, gave them a time extension. And it took the anxiety out of the room - you could just feel the pressure release valve and then the meeting was able to be more functional after that.

So whether we're facilitating or not, we can play a role using our facilitation skills in helping manage meetings.

Julie Marcy: Got it. And another question that's come in, it seems like some of the examples have a specific issue that they were trying to deal with. What would you recommend if you're in a situation where you have to facilitate a group with multiple issues and criteria, like looking at economics, flooding, and so forth in a watershed perspective where the group's got to handle multiple issues? What would you suggest for them?

Therese O'Rourke Bradford: The Forest Service is a multiple-use agency. So there are inherent conflicts. The process was driven by the Endangered Species Act and so the

forest biologists were kind of at the forefront. We had to balance what the forest biologists with engineering practices, recreation uses, the timber harvest, etc., it was an absolute conflict.

And so through working with those different groups and hearing what they needed and pulling all the different components together, that was how we came with a solution. So that was definitely a multiple use project, though driven by the biology.

Julie Marcy: Right. Thank you. Okay, any other questions that folks have specifically for Therese before we open it up to any general facilitation questions?

Man: Which group did you find to be the most uncooperative and indecisive, which agency would you say in your California example?

Julie Marcy: Oh, we're going to name names. Here we go.

Therese O'Rourke Bradford: I'm sorry, can you repeat the question?

Man: In the California example, which agency do you think was most uncooperative and indecisive?

Therese O'Rourke Bradford: Oh, boy. Uncooperative and indecisive, you know they all wanted their way. And so as long as they were getting their way, they were cooperative. And as long as there was pressure, they were willing to work together. But it really depended on the style of the manager. With the four different forest supervisors, I had one that was highly analytical, one who was extremely decisive no matter what, one who had to collaborate, and then the other who was a combination of the above.

The one who was always decisive was probably the toughest because she would alienate so many people. And then with the Fish and Wildlife Service, we had two different field offices. One was highly engaged and one wasn't engaged and so it was kind of a mixed blessing with the one was highly engaged because the other one just kind of went with whatever happened.

Julie Marcy: Thank you.

Therese O'Rourke Bradford: Was that actually - was that a politically correct answer there?

Julie Marcy: I'd say so and you pointed out that even within an individual agency like the Forest Service, you had multiple personalities and behaviors.

Therese O'Rourke Bradford: Yes, and frankly the one that took the most time was the collaborative decision maker because it really - he really would not make a decision unless absolutely everyone bought into it.

Julie Marcy: Any other questions for Therese? Okay, then we'll just open the floor. Are there any other general facilitation questions that you may have, not necessarily specific to the examples Therese shared with us? Or, if you have some good examples or a great new tool or something facilitation oriented that you'd like to share with us, something that's been a success for you?

Monique Savage: This is Monique Savage in the Rock Island District. I am about to put on an open house with multi-agencies. It's the Fish and Wildlife Service, DNR, and the Corps. And I'm just wondering, we don't - we've kind of done a risk register and we've - don't anticipate there being any negative feedback from the public. We think that there - it's going to be positive, however is there anything that you can prepare yourself for or anything you can do in the up front to make sure that the open house goes smoothly if there is opposition?

Julie Marcy: Go ahead, Therese. Why don't you start off since you just had a great public meeting example recently.

Therese O'Rourke Bradford: Well at that public meeting on Monday -- and at most of our public meetings -- we actually have security. Those are the ones that we anticipate will be problematic. So we'll have private security there and/or we'll have some security there from the Corps. That is what the Corps has done.

In my other experiences, we haven't used security. What we've done is we prepare frequently asked questions and have information packets for the press or for people who might be opposed to it. If you're having an open house where there isn't a place for people to speak, sometimes people can get angry about that because they want to have their say. And within an open house environment where I like to have poster sessions where people go around and visit, I'll also have an area where they can talk into a recorder so that they can get their comments recorded.

Sometimes people have been upset that they haven't had a chance to have their say, so it depends how that public meeting is sponsored.

Julie Marcy: Yes, that's great Therese, and this is Julie. Sometimes I've seen folks provide in lieu of the recorder or perhaps in addition, something like index cards or a little form where folks can put like their name and their comment or questions to be added in. So Monique, did that help?

Monique Savage: That gave me some great ideas. Thank you so much.

Julie Marcy: Therese, you also said in that Monday example that the use of breaks helped diffuse the situation

Therese O'Rourke Bradford: Right, just taking breaks and having people get up and move because I think people literally get stuck in their position, and so if people are stuck, have them get up. Have them move around. Sometimes I just have people literally get up and stretch and as a facilitator, I'll say "Come on everybody, stand up," or I'll just say "Hey, we're going to take a 15-minute break" and they'll do that naturally. Or I'll have them break into small groups or whatever just to get them to physically move so mentally they can also move off their position.

Julie Marcy: Understood. That's great. Okay, any additional questions? Well Therese, thank you so much for such an outstanding presentation. You covered such a wide gambit of examples and experiences. I think there was something for everyone, even though we had a very diverse group participating, so I really appreciate your willingness to share your experiences with us.

Therese O'Rourke Bradford: Thank you very much.

Julie Marcy: You're most welcome. And with that, be watching for the next announcement for a quarterly facilitation webinars. Remember that we will be posting a copy of the PowerPoint and the recording of the webinar on the Facilitators Exchange Web page. If for some reason you don't have that address, just send me, Julie Marcy, an Outlook note and I'll get that link to you. And thank you all for attending and I hope you have a great afternoon. That concludes our session.

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