



## *The Role of a Process Observer/Participant*

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We form groups and leadership teams out of the conviction that several minds make better decisions. Yet, "group think" is a problem and sometimes groups get lost or stuck in **how** they go about their business. Some groups are fun to be part of; others are a royal pain. Some are productive; others seem to meet endlessly without much to show for their effort. As with individuals, some groups are reflective on their process and others are clueless.

Appointing one of a team to be a "participant-observer" is one way to help groups self-monitor the ways they go about their business. Designating someone creates a mindset and provides legitimacy for at least one member to answer, "how's it going here?"

The participant-observer is expected both to be in the conversation and at the same time to watch and listen to the group's dynamic. [A process-observer, by contrast, might do the same thing but would not participate in the conversation, staying instead on the sideline until called upon.]

What does a participant-observer do? A trick of psychic magic: to be at the table, fully engaged in the conversation and, at the same time, like a sky-box coach, taking note of the patterns of play on the field below. The *fully-engaged* role is obvious. But what of the *observing* role? Here's what s/he tries to note:

- **Time control.**
  - Is the group staying on task?
  - Are issues being over or under-discussed?
  - Is the group using its time efficiently and effectively?
  - Does the meeting drag?
  - Does it start and end on time?
  
- **Air-time:**
  - Who is speaking more? Who less?
  - Does the group encourage reticent members to speak up?
  - Do the chatty-charlies and cathy's allow others to get a word in?
  
- **Relevance:**

- Does the conversation stay on track?
- Are there sidebar conversations going on?
- How often does interesting but not pertinent information get on to the table?
- Are decisions being made? Are they clear?
- **Covenant & Ground-rules:**
  - Is the group honoring its previously formed statement of "how we want to work together"?
  - Are decisions made by consensus or vote? Does everyone know how to form a proper resolution or policy?
  - If a member fails to observe the group's process rules, who calls her/him to account?
- **Leadership:**
  - The chair or team-leader is responsible for presenting the agenda; is there opportunity to modify it?
  - Do other members take the lead in presenting motions or defining issues?
  - Do members come prepared? Are they engaged in the conversation?
  - Are reports timely and relevant?
  - Do members volunteer to address follow-up issues?
- **Quality:**
  - What is the tone of the meeting? Is it filled with good feeling? Or irritation? Is it relaxed? Fun? Or, heavy?
  - How do members interact: With respect and good will? Do they listen well and speak fairly? Or nastily? With suspicion or distrust?
  - Do members work toward a common goal or seem more invested in scoring points or triumphing with their agenda?
  - If tension or conflict arises, how is it dealt with?

At some point, most often toward the end of the meeting, the participant-observer is asked to summarize what s/he noticed about the group's activity. This need not be overly long, but should be more than "things went well." As a brief illustration, s/he might say something like:

"We moved along well tonight, although things seemed to bog down around [issue or item]. We mostly listened to each other, but there were a few instances of cross-talk and on one occasion [name] interrupted [name]. There was a good deal of laughter, particularly after we confronted the faux pas in last month's minutes. The disagreements around [issue] prevented a consensus and led to some tension; however, [motion maker's name] motion kept us on track. Several members had not read their background reports and that slowed things down. We made a decision to [do something] but did not assign anyone to communicate that decision. All in all, a pretty good meeting."

Of course, this illustration is shorter than what might be typical, but if the feedback is succinctly delivered, it should take no more than a few minutes. Note: no recommendations are being made. It is up to the group to listen and decide next time how to address any shortcomings. That said, if several meetings reveal the same kind of difficulties, the team-leader should devote an agenda item to address them.

It is good practice in longer meetings— say a daylong workshop — to have a participant-observer report about midway where a break might naturally occur.

Rarely, but now and then, a participant-observer may want to ask the team-leader for a moment to offer "a process observation," to pause the meeting as a way of calling the group to notice that its own behavior is not helping the group's decision making. Think of it as a kind of "time-out" to allow the group to settle and re-group as a team.

Nearly anyone can be a process-participant/observer. Indeed, it is good to rotate the role among group members over time.

Please let me know if you have thoughts to improve this summary.