Lucid Facilitator's Guide

PRE-MEETING INTERVIEWS BEFORE A MEDIATION OR CONFLICT RESOLUTION

by Tree Bressen

This template guides users through a pre-meeting interview in preparation for a conflict resolution session of 2-6 participants (+ facilitator). The latter session may be referred to as a mediation.

The planned session will attempt to heal a relationship that has broken down so that the parties can work effectively together in the future.

Use this template to help you learn about the conflict and prepare for a successful conflict resolution session.

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HOLD THE SPACE AND TRUST THE PROCESS

As a neutral third party, you have an opportunity to assist a group that's trying to heal so they can move forward.

This is a support role; your job is not to solve problems for them. Instead, you will need to trust that the people involved are fully capable of moving through the process to find their own solutions.

Why You Should Hold Interviews Before a Conflict Resolution

Conducting pre-meeting interviews increases the chance of success for the session. During the pre-meeting interviews, you'll gain empathy and understanding for the journey each party needs to make—empathy you'll need when it comes time to provide guidance during the session. This is when you as the facilitator create a fact-based foundation for your belief in the group's capability.

If the parties involved have agreed to work with you to solve their conflict, this means they are invested in finding a successful resolution. The pre-meeting interview gives them dedicated time to ask any questions they might have about the process and to learn what they can do to prepare for the session. In this way, the pre-meeting interview can help the people in conflict just as much as it helps you as the facilitator.

These interviews are not a job you can delegate. Because you are both learning about the content of the conflict and establishing rapport, the person conducting the pre-meeting interviews needs to be the same person who will facilitate the session.

The goals and reasons for a pre-meeting interview are:

1. To give the primary people involved an opportunity to express themselves.

Getting out energy, feelings, and ideas related to the conflict beforehand tends to open up internal space for new thoughts to come in, allowing for more creativity and flexibility to enter.

2. To inform you, the facilitator of the upcoming session, about the conflict.

You'll learn the main issues, where things have gotten stuck, people's perceptions of the history so far, why they feel the need for facilitation, the different people's needs and goals, and so on.

3. Establish trust and rapport between the facilitator and attendees.

An existing positive relationship makes it so that during the subsequent session, when you offer an intervention, process proposal, or suggestion, participants will be more likely to take it in stride with an assumption of good intent on your part.

THE INTERVIEW PROCESS

Goal

To prepare for and increase the chances of success for an upcoming conflict resolution session.

Desired Outcomes

- An understanding of the conflict and back story.
- Answers to any questions about the upcoming session
- Mutual trust and rapport to help everyone work together

Duration

20-60 minutes per interview

1. Greetings and Reassurances
2. Open-Ended Questions
3. Follow-Up Questions
4. Needs for the Session
5. Closing

STEP-BY-STEP INSTRUCTIONS

Before the Interviews

Scheduling and Invitations

Aim for interviews 3-14 days before the session; 5-9 days is ideal. If the interview is too far ahead of the session, it may go stale. For example, the interviewee's position could shift or harden, and the energetic opening created by freedom to vent is likely to erode. If the interview is too close to the time of the session, you have less opportunity to integrate what you learn into the session plan, expectations, or agenda.

Contact people regarding interviews as far ahead as needed to fulfill that timetable. Depending on the participant's needs, an interview may or may not be scheduled precisely. For example, for one person who's busier and highly scheduled (or who is more comfortable emotionally if they know exactly when the conversation will be happening), you might set a day and time in advance; whereas for another person whose schedule is easier, you might let them know via email (or text message), "I will be giving you a call sometime this week to check in about our upcoming meeting."

It's good to give the interviewees some idea why you want to talk with them. For example: "I want to hear your perspective on the situation and how you see the upcoming session." **You don't need to provide participants with a written agenda for the interview**, and in fact doing so would probably be too formal and take away from the spontaneous, conversational atmosphere that's more likely to fulfill the goals. The agenda in this template is solely for your benefit.

Choose a location and time for conducting the interviews that allows you to give your full attention without interruptions. Interruptions from the participant's side, while not desirable, do not have the same negative impact on rapport that a shift in the interviewer's attention does.

Equipment Needed

- If you believe taking notes would be helpful, be ready with a notepad and pen, or computer.
- If you'll be taking notes, prepare for a hands-free call by using either a headset or speaker phone.

Personal Preparation

It's important to approach the interviews (as well as the later conflict resolution session) with curiosity, an open mind, and a ready heart.

You aren't there to take sides or judge anyone. You're on a search for the internal coherence of each person's story, of how it makes sense from their perspective. It doesn't matter whether or not you personally agree with what someone expresses; what matters is that you listen well.

Bring compassion and assume positive intent.

During the Interviews

1 Greetings and Reassurances

Purpose	To set the tone and expectations for the meeting.
Outcome	Any questions about the meeting intentions are answered.
Duration	A few minutes

Instructions

Greet the participant and ask whether this is still a good time for the interview. Even if you've scheduled the conversation in advance, something could have come up that has the person too distracted to participate effectively. If the answer is no, ask when would be better and make an alternate plan. If they're ready for the conversation, thank them for making time to talk with you.

Then, explain how you'll handle any information they give you. For example, you may wish to offer the following initial reassurances:

- **Confidentiality**—no specific information from the interview will be shared without consent.
- **Neutrality**—you are having one-on-one conversations with participants to learn their perspectives, and you are committed to an impartial stance on the overall situation.

  In other words, they don't have to worry that they are supposed to present you with an objective view of things; rather, they can be passionate, one-sided, etc., and you'll be able to hold that in balance with other viewpoints.
- **Answer any questions** the person might have.

2 Open Ended Questions

Purpose	To gain an understanding of the situation
Outcomes	*For the facilitator:* Information about the conflict from this person's perspective *For the person interviewed:* Experience articulating the issues and being heard
Duration	10 to 40 minutes

Instructions

Start the main content of the interview by asking a very open-ended question regarding the situation that is the subject of the upcoming conflict resolution session. For example:

> "Can you tell me how you see the situation with X?"

OR

> "What's your take on what's going on?"

Listen with good attention to their perspective. Let them get their story out and try to not to interrupt unless they get off track from the subject. It often helps to reflect back pieces of what you are hearing—especially (and most importantly) the emotional aspects. For example:

> "It sounds like it was really hard for you when that happened," or "That sounds really frustrating."

It's okay to express sympathy, as long as you don't take sides.

2 continued

If they hesitate or you sense they are not yet complete, encourage them to continue or go deeper; a simple, open-ended prompt, such as, “What else?” often works best for this.

Overall, aim for a conversational style and authentic connection.

TIP: If they are sharing a story about someone else’s behavior they see as a problem, include the following question:

> “When that person does that [thing you don’t like], what is your usual response?”

This helps you understand how the situation is co-created, and seeds future reflection by each party on their own contribution to a difficult situation.

Once the person has shared their perspective, move on to asking any follow-up questions.

3 Follow-Up Questions

Purpose	To clarify any points of confusion
Outcome	Confirmation of the details
Duration	5 to 10 minutes

Instructions

Start by briefly reflecting back the essence of what you’ve learned so far, acknowledging what the person’s experience has been. Then confirm:

> “Have I captured that correctly? And is there anything else you want me to know or think would be useful?”

You may also have follow-up questions.

3
continued

Tip: It's common in a conflict situation for upset participants to blame the other party(s). It tends to be easier for each person to see the other person's power and contribution than their own. So after you've heard someone out and established rapport, if you sense this is the case, you can help prepare for the mediation by encouraging people to consider their own role. For example, you might ask follow-up question(s) such as:

- "What do you see as your own power in this situation?"
- "What options do you have at this point in the situation that you haven't tried yet?"
- "What do you see as your contribution to the problem?"
- "What's your responsibility in this?"

Such questions need to be asked with care—you don't want the participant to feel blamed by you for the problem (that would impact the neutrality you committed to).

Rather, as the facilitator you hold that human situations are generally co-created, and you gently share that perspective as one way of being of service to the participant. No one likes feeling disempowered, so if people are able to regain their own sense of agency, they usually feel better, and arrive at the session with more sense of creative possibility which helps it go better.

4 Needs for the Session

Purpose	To define anything that will help the session go better for this participant
Outcome	A list of ways to help this person in the session
Duration	3 minutes

Instructions

To segue toward closure, ask what they need to participate well at the session. Keep this quick and informal. You aren't asking for a list of demands, but rather anything that can help this person feel more comfortable.

For example, you might inquire about desirable ground rules, what signs you might see from them if they are feeling triggered and how they would like you to respond in that case, and anything else you can offer that would help the session go well. You may wrap up this part of the conversation by encouraging them to apply whatever self-care practices might benefit them before or after the session; for example, getting good sleep the night before, or lining up a supportive friend to talk with afterwards.

5 Closing

Purpose	To confirm next steps and thank each other.
Outcome	A list of next steps (if any)
Duration	2 minutes

Instructions

Confirm any next steps, if appropriate. Reiterate the expectations you set in advance about how you will use what you've learned. Then close by thanking them for talking with you.

Repeat this process with each stakeholder or stakeholder representative.

After the Interviews

Confirm that the interview conversations have been completed. This is normally combined with sharing/confirming logistics and plans for the upcoming conflict resolution session. For example, an email message as follows:

> "I've completed advance conversations with [both of you] [or name, name, and name]. I look forward to our session on:
>
> **Friday 3pm at [location].**
>
> Please arrive a few minutes early to settle in so we can start on time. Thank you, and let me know if you have any questions before then."

ADDITIONAL RESOURCES

There are many techniques and approaches to conflict resolution and mediation. Here are a selection of those I've found most useful in my practice.

On the Web

My (Tree Bressen's) website includes many articles and resources for conflict resolution.
www.treegroup.info
Visit the Library page and click on the "Conflict Resolution" topic.

National Association for Community Mediation
http://nafcm.site-ym.com/
This site includes a directory listing local mediation centers, many of which offer regular trainings and other resources.

Center for Nonviolent Communication
https://www.cnvc.org/

Books

"Difficult Conversations: How to Discuss What Matters Most" by Douglas Stone, Bruce Patton, Sheila Heen.
https://smile.amazon.com/Difficult-Conversations-Discuss-Matters-Paperback/dp/B004CZ1UP8

"Crucial Conversations: Tools for Talking When Stakes Are High" by Kerry Patterson, Joseph Grenny, Ron McMillan, and Al Switzler.
https://smile.amazon.com/Crucial-Conversations-Talking-Stakes-Second/dp/0071771328

"Fierce Conversations: Achieving Success at Work and in Life One Conversation at a Time" by Susan Scott.
https://smile.amazon.com/Fierce-Conversations-Achieving-Success-Conversation/dp/0425193373

ABOUT THE AUTHOR

This template was designed by Tree Bressen.

Tree Bressen has been blessed with a calling to help groups function well. Over more than two decades, she has served a wide variety of (150+) organizations. As a consultant, her design work focuses on alignment of human action toward purpose. She facilitates lively, connecting meetings that produce effective results, and offers trainings that are engaging and practical.

Tree is also the founder of the nonprofit collective producer of Group Works: A Pattern Language for Bringing Life to Meetings and Other Gatherings. This beautiful 100-card deck has been used by thousands of people in dozens of countries around the world to make meetings better.

Tree's website www.treegroup.info includes an extensive selection of readings, articles, workshop handouts, and other resources.

She can be reached via email at tree@treegroup.info.

Additional Resources Available from Lucid Meetings

Tree Bressen's Work with Lucid Meetings

- Blog Posts and Meeting Designs by Tree Bressen

Meeting School Resources

- **40+ Sample Agendas with Facilitator's Guides**
- **A Guide to Leading Sensitive Conversations by Patricia Thompson**
- **A Protocol for Clearing Questions and Handling Complaints by Paul Axtell**
- The 16 Types of Business Meetings
- The Meeting Performance Maturity Model
- How to Structure Effective Meetings
- How to Create Meeting Agendas
- How often should you meet?
- What goes into a meeting invitation?
- What goes into meeting notes?
- Glossary of Meeting Terms