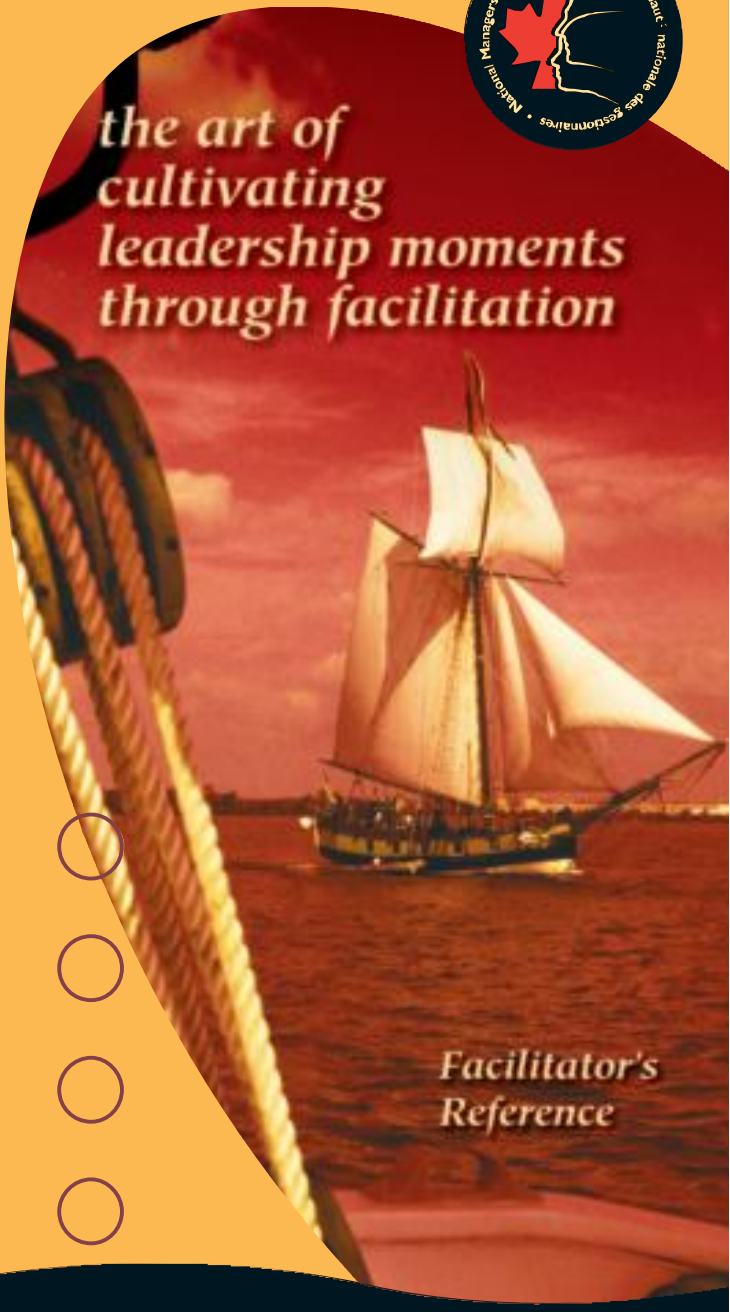
National Managers' Community

La communauté nationale des gestionnaires

Facile...

the art of cultivating leadership moments through facilitation

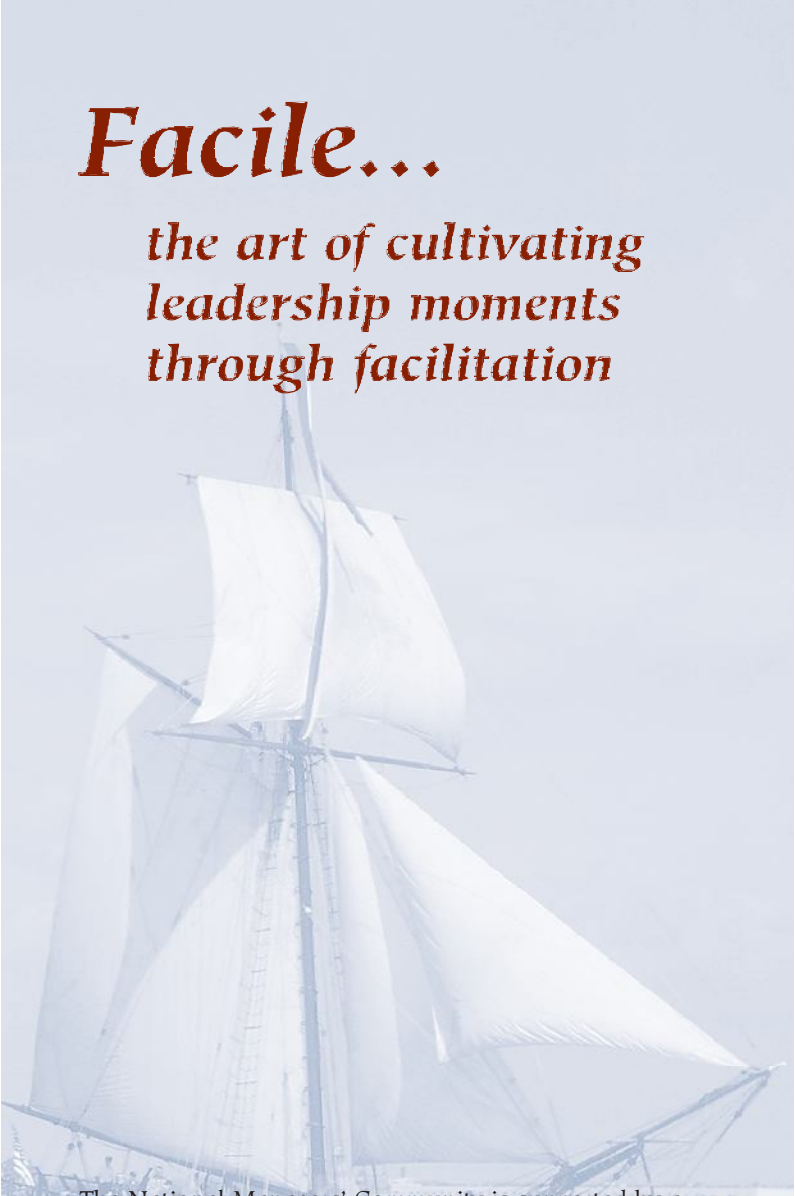


Facilitator's Reference

Canada

Facile...

the art of cultivating leadership moments through facilitation



The National Managers' Community is supported by a Secretariat and a Council made up of representatives from regional manager networks and the National Capital Region. They provide leadership and support to managers across the Federal Public Service by acting as an advocate, facilitator and information broker.

Visit our website:
www.managers-gestionnaires.gc.ca

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Foreword

As Interim Champion of the National Managers' Community, I am proud to present the first edition of *Facile*.

A combined Managers' reference and Facilitator's reference, this book is a navigational tool that makes the link between our two other publications: *Tools for Leadership and Learning: Building a Learning Organization* and *Coaching Practices for Managers*. *Facile* exemplifies the importance of dialogue between the manager and facilitator in working together as agents of change.

Facile was co-authored by two professional public servants who share a common vision of managers and facilitators partnering together to build a vibrant Learning Organization culture within the Public Service of Canada. We are extremely grateful to Sylvie Lapointe, a Certified Professional Facilitator (C.P.F.) with Health Canada, and Bob Chartier, an expert in Learning Organization Methodology and Practices from Indian and Northern Affairs, for generously sharing their knowledge and expertise so that this work can flourish across Canada.

The National Managers' Community is committed to continuous learning and to providing practical tools to help managers and employees across the country be the best the Public Service has to offer. *Facile* illustrates that the Public Service is an organization in which we learn from each other, sharing tools and techniques to build a work environment that values personal initiative, innovation, team playing, learning and trust.

Facile is written in plain language and with the practitioner in mind. We believe it will be another valuable resource for public service renewal in the future.

Facile...use it...share it...have fun with it...as you go forward to facilitate change in your organization!

Ric Cameron
Senior Vice-President
Canadian International Development Agency

Author's Acknowledgments

We have written this book as a navigational tool to help you find your way through the sometimes choppy waters of the *business side* of being an agent of change. It is meant to answer the question: "How do I put into practice these great *Tools for Leadership and Learning* in a professional and effective way in my organization?" It is written in a friendly conversational style – so that you can imagine that we are sitting next to you sharing some of our tricks of the trade. Our book is meant to coach you along this wonderful adventure of facilitative leadership. We are cheering you along from the sidelines!

The impetus for this book came from Sylvie's work with the great folks at Maritime Forces Atlantic N6 Facilitator's Network and a leader, Bob Thompson, who put forth his vision of creating a "neighbourhood" of volunteer facilitators to help build and sustain a learning culture in his organization.

The support of the National Managers' Community under the direction of Jill Lang Ward and Adele Colby, and the leadership of the Interim National Managers' Champion, Ric Cameron and the ADM Advisory Board, has led to the publishing of this first edition of *Facile.*

A special mention to our home departments for their continued support in particular, Patrick Borbey, Assistant Deputy Minister at Health Canada and Carolyn Davis, Assistant Deputy Minister at Indian and Northern Affairs.

We also want to recognize the special friends and colleagues who have contributed to this book: Paul Lefebvre, Tony Nash, and the members of our Learning Organization Communities of Practice (you know who you are).

Heartfelt thanks to Karen Bonner for her project management, editorial contributions, co-ordination and nurturing of the Communities of Practice and mostly, for championing our work with such inspiring enthusiasm.

Finally, we would like to dedicate this book to the memory of Michael Nurse, an illustrious leader...we are better people for having known him.

Sylvie Lapointe, C.P.F.
Bob Chartier

Introduction

First of all, we will discuss our choice of title. A classic definition of the word facile is "easily accomplished". Managers need easier ways to deal with today's complex workplace. In a regular workday you deal with rapid information exchange, shifting priorities and fewer resources. You can use facilitation to make your life easier by aligning tools, processes and people to reach a common goal. Facilitation is *the art of cultivating leadership moments* by allowing people at all levels to step up and take action, and be agents of change.

This book is a navigational tool that makes the link between our other two publications: *Tools for Leadership and Learning* and *Coaching Practices for Managers*.

We do not pretend to have written the definitive resource on facilitation for the Public Service. We have simply written about what we know in the hopes that you can benefit from our experience and our learning. Feel free to agree or disagree. We encourage you to engage in conversations with colleagues to share your perspectives....that's when learning happens.

A ship is a good metaphor for teamwork and leadership. Sailing is a combination of strategy, skill and art. You have to be able to read the environment to determine the strategic course of action, then use your skills and tools to pilot the ship so that you can reach port. The art of sailing comes from experience and trusting your instincts. Sometimes the waters are rough, sometimes the waters are smooth, and sometimes the crew decides to mutiny!

Managers are much like captains. Leadership, commitment and skills are required to steer the course. As a captain you need to know the strengths and weaknesses of your crew and how they can work in unison. You need to know where you are going, how to get there and what you need to support your journey.

Facilitators are like navigators. You help plot a course to get to the destination and you act as guides during the voyage.

We have written this book to help you along this journey on the wide open seas of the Public Service.

The *Manager's Reference* is for managers who have made the choice to be leaders in the practice of Learning Organization principles. Building the practice of facilitation in organizations opens up more conversations, more possibilities, more action and much greater commitment.

The *Facilitator's Reference* speaks to the facilitator/practitioner who is striving for a renewed measure of quality control and greater professional approaches to their work. Facilitators are practitioners when they ground their work in Learning Organization theory and practice, championing new ways of thinking and getting things done that contribute to sustained success and effectiveness of organizations.

This book is written in the same sequence as the work, from the initial call to the actual event. It is a step by step conversation between the manager and the facilitator, applying a business model to enhance the application of facilitation tools, techniques and practices.

Read it and learn how to get work accomplished with more ease.....*facile*.

A Story

Let me tell you a story about memorable leadership moments...

Our department had gone through a major reorganization and the Deputy Minister (DM) wanted to hold an "Inaugural Departmental Executive Committee (DEC)" retreat with his DEC team (Assistant Deputy Ministers and Regional Directors General) and all the Directors General to launch the transformation process in the department. They had hired a well known consulting firm to assist them throughout the planning and implementation of the reorganization and to facilitate the retreat. I got a call from the Executive Director in the Deputy Minister's Office asking if I could meet with her for 15 minutes or so to brainstorm some ideas for this retreat. This was a breakthrough for our little internal facilitation unit! It was the first time **ever** that Senior Management had made a request for our services (even if it was just to share some design ideas...) As is often the case, it was a personal connection that made this possible. One of the administrative staff had seen me in action and suggested to her boss that we might be of help.

I was thrilled and scared at the same time - "this is BIG" I thought, "and this is our chance to show what we can do and gain more credibility". Here was an opportunity for me to step up to the plate and do what I do well. So I seized this *leadership moment* with optimism and, I have to admit, some apprehension. That little voice inside my head was talking a mile a minute and being very critical. I asked myself, "What do I need to feel more courageous?" I needed the support of a colleague who agreed to partner with me. We put our creative thinking hats on to prepare a paper describing some possible options which we presented to the Executive Director at our meeting. Kudos to this lady who made us feel comfortable from the start and listened to us with great interest (*first leadership moment - we were treated with kindness and generosity*). Because we love our job it was easy for us to describe with great enthusiasm the approaches we had envisioned for this

retreat. One idea in particular seemed to strike a chord: we proposed to use Bill Reid's sculpture of the *Spirit of Haida Gwaï* as a metaphor to discuss what were the strengths and assets of our organization which would enable us to move forward and what could be some of the challenges facing us. The 15 minute meeting lasted close to an hour... we were all excited by the possibilities. At its conclusion, the Executive Director said that she would share the ideas with the DM and that she would propose that **we** facilitate the event! (*second leadership moment - she saw the possibilities and was willing to make a bold move*). We soon got word that the DM and the Associate DM agreed to go with the Haida Canoe metaphor and to have us facilitate the event! (*third leadership moment - they were willing to challenge their mental models... they recognized and trusted the internal expertise for an important event).*

We had a meeting with the DM and the Associate DM the morning before the event and walked them through the agenda. Some questions were raised and we were asked to share our rationale. We made some suggestions to slightly tweak the process which were accepted. The message we received again at that time from our most senior leaders was that they trusted our judgement. (*fourth leadership moment - the gift of trust*)

The event was one of those peak memorable moments in my facilitation career... People not only went along with our less than traditional approach to action planning but they jumped in with two feet and had fun doing it! (*fifth leadership moment - thanks to all the senior management for their willingness to trust the process and create positive outcomes).* At the end of the meeting, a participant stood up and publicly thanked the DM and Associate DM for choosing internal facilitators for this event. She applauded the fact that the departments' facilitators had delivered a very professional and meaningful service as well as, and even surpassing, many of the outside costly private consulting firms she had worked with... *(sixth leadership moment - a spontaneous expression of genuine gratitude)*

At the end of the day, I remember leaving the hotel feeling like I was on cloud nine, laughing and hugging my partner. I was so proud of what we had accomplished together thanks to the vision and trust displayed by our senior managers. Someone saw what we had to offer, acknowledged it and asked us to make a true contribution - now that is validation!

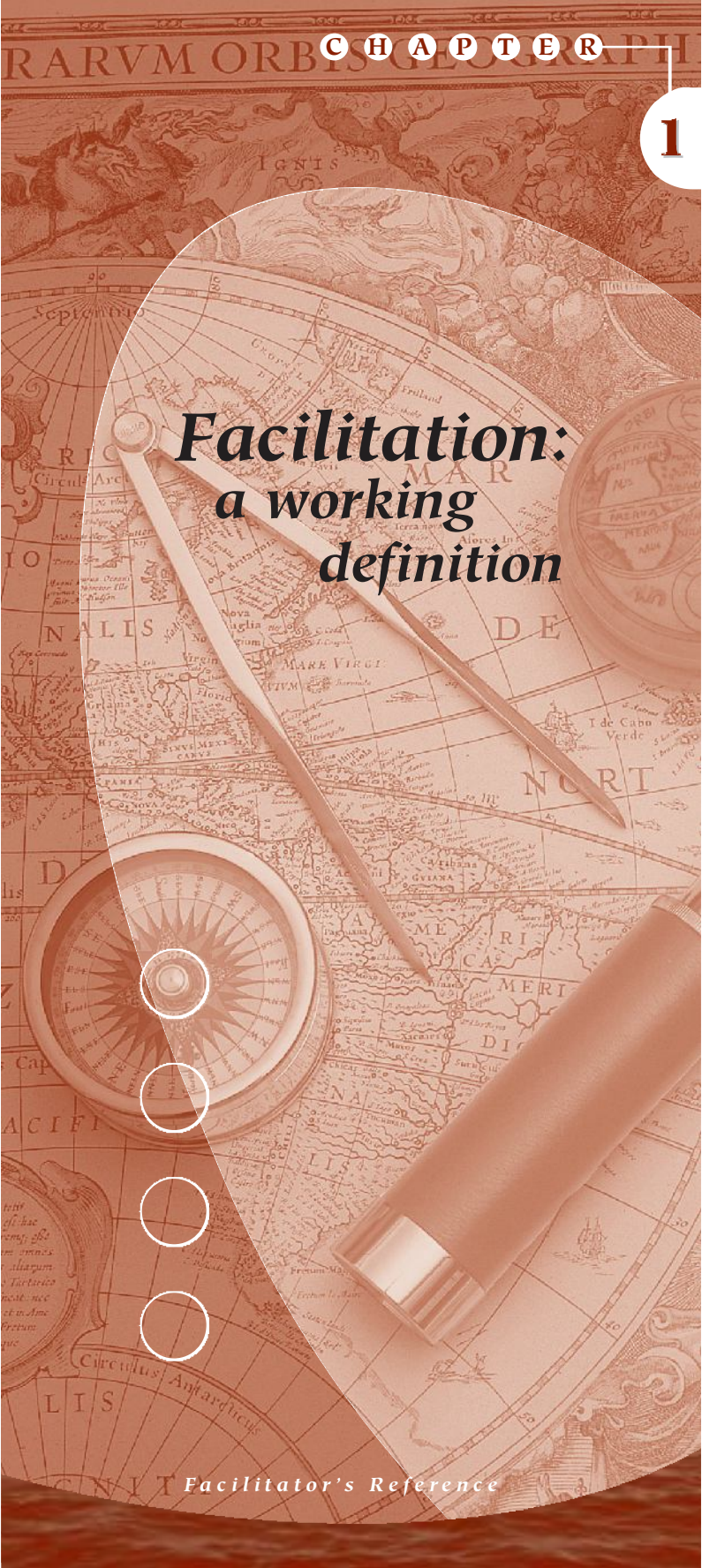
That is what facilitation can do... it can create space for the true leaders, at all levels of the organization, to step up, seize the moment, and shine their light on others.

Facilitation is the art of cultivating the leadership moments in an organization.

Sylvie Lapointe C.P.F

CHAPTER 1

Facilitation: a working definition



CHAPTER 1

The modern public sector organization, like its private sector counterparts, is becoming more and more identified as a knowledge-based institution. That is to say both types of organizations deal primarily in ideas, policies, values, programs, communication and research. Two things that are synonymous with working in knowledge-based organizations are *groups* and *meetings*.

We have always worked in groups and a meeting is a traditional way of exchanging knowledge, but in a faster paced information rich workplace work groups are under pressure to hold more effective small and large group processes and more focused meetings.

Many skilled social scientists have wrestled with the questions around group effectiveness. We learned a great deal from the work of the early pioneers who struggled to move the workplace from a predominantly technical base to a more people centered foundation. The study of group dynamics has moved along many planes, and thanks to the work of those pioneers we now have a working methodology of group management, which we call facilitation.

The root of the word facilitation comes from *facile*, which means to make easy.

Early thinkers recognized that groups go through various phases of development. A well-known definition of group stages is ***forming, storming, norming and performing***:

In the **forming stage**, groups come together for a particular reason, spend some or a lot of time floundering over purpose, mandate, challenges and such. This floundering can sometime become tempestuous. People are trying to establish their roles and their places in the group, which can lead to some conflicts. That is what is called the **storming phase**.

Then, in the **norming stage**, they finally come to an agreement about what the group's task and objectives really are so they can go on to become a **performing group** and deliver on their objectives. This four stage process can take a relatively short time or be dragged out for a long time.

The process is linear: you graduate from one stage into the other in order. However, a group can fall back into a previ-

ous stage if circumstances change. For example, if a person leaves the group or a new person joins the group, or a new priority is set for the project, etc.

We now know that the degree of skilled facilitation available to the group is what makes the difference between a long or short struggle to become a performing group. Facilitation can come quite naturally to a group, or it can be learned, designed and implemented.

Facilitation can help the group achieve success by aligning the following three elements:

PURPOSE: The *Why:* Reason for being/goal to pursue.

PROCESS: The *How:* Methods to achieve the Goal / PURPOSE.

PEOPLE: The *Who*: The role the facilitator and the participants' play in the PROCESS which will lead them towards achieving the PURPOSE.

There are three critical elements to good facilitation:

A. Facilitation Values
B. Facilitation Tools and Practices
C. Facilitation People

A. Facilitation Values are the cornerstone of good work in this field.

In his book, *The Skilled Facilitator,* Roger Schwartz (Schwartz 1994) discusses three core values in facilitation:

1. Valid, relevant information, which is shared by all. Information can be in the form of data, facts, ideas or even opinions, wishes and feelings.

2. Free and informed choice means people can define their own objectives and methods and be free from facilitator manipulation. If they decide to change, it is their call.

3. Commitment means people feel personally committed to the choices they made in the facilitation process.

Other principles critical to good facilitation include:

- Everyone is a full participant;
- All points of view are recognized;
- People's time is valuable;
- Hierarchy is left at the door;
- Inclusion and respect for diversity is paramount; and,
- The group OWNS the process and the outcomes.

Without these core values you will not have facilitation, you will be running a meeting.

B. Facilitation Tools are critical for successful implementation of those values.

Facilitation tools are those simple practices and processes that help you get to the "facile" of effective group work. Some core facilitation tools include:

- icebreakers;
- brainstorming;
- decision charts;
- analysis diagrams;
- mind maps;
- challenge walls; and,
- process mapping.

Each one of these tools has two or three current variations for speed and focus.

Flip Charts: Facilitation has generally remained low tech with the **ever-trusty flip chart** as the tool that everyone can use and enjoy. Although still very much in the minority, there are increasing numbers of facilitators who are successfully integrating more high tech elements into facilitation (for certain audiences and processes). We are not advocating that you completely discount new IT-driven facilitation tools, but the tried and true flip chart offers so many advantages to the facilitator, which will be illustrated later, that it will remain the principle idea capturing tool for many years to come.

C. The Facilitator is, of course, the key to good facilitation.

The facilitator's role is to help the client get results and to manage the process effectively. Facilitators bring with them their knowledge and tools, but more importantly themselves in order to be able to do the job

right. By this we mean that a brilliant design and a solid process are not enough on their own to make that magic happen in a meeting. The facilitator needs to be fully present, hearing what is said, observing the non-verbal cues, noticing the group dynamics and modeling a behavior that invites openness, acceptance and trust.

Facilitation is not just a job, it is a way of being as well as a way of doing...
The key to being a good facilitator is the ability to maintain neutrality and objectivity towards the content while bringing out the passion and commitment of the people.

Therefore, the facilitator is concerned about the HOW and must remain neutral about the WHAT
Although a facilitator's job is to be objective and stay out of the content being discussed, it helps to have a basic *understanding of the business of the organization* you are working with so you can follow the conversation (some of us have to admit that we get pretty lost when the conversation turns to high tech or science):

- Are we on topic or off topic?
- Are there some important nuances in the way different individuals are interpreting what they are hearing?
- Is there really a difference of opinion or are they saying the same thing in a different way?

It is also useful to be *familiar with the work environment and related business practices* of the organization you are working with so that you have a cultural context for the work at hand (e.g., there are big differences between the private and public sectors).

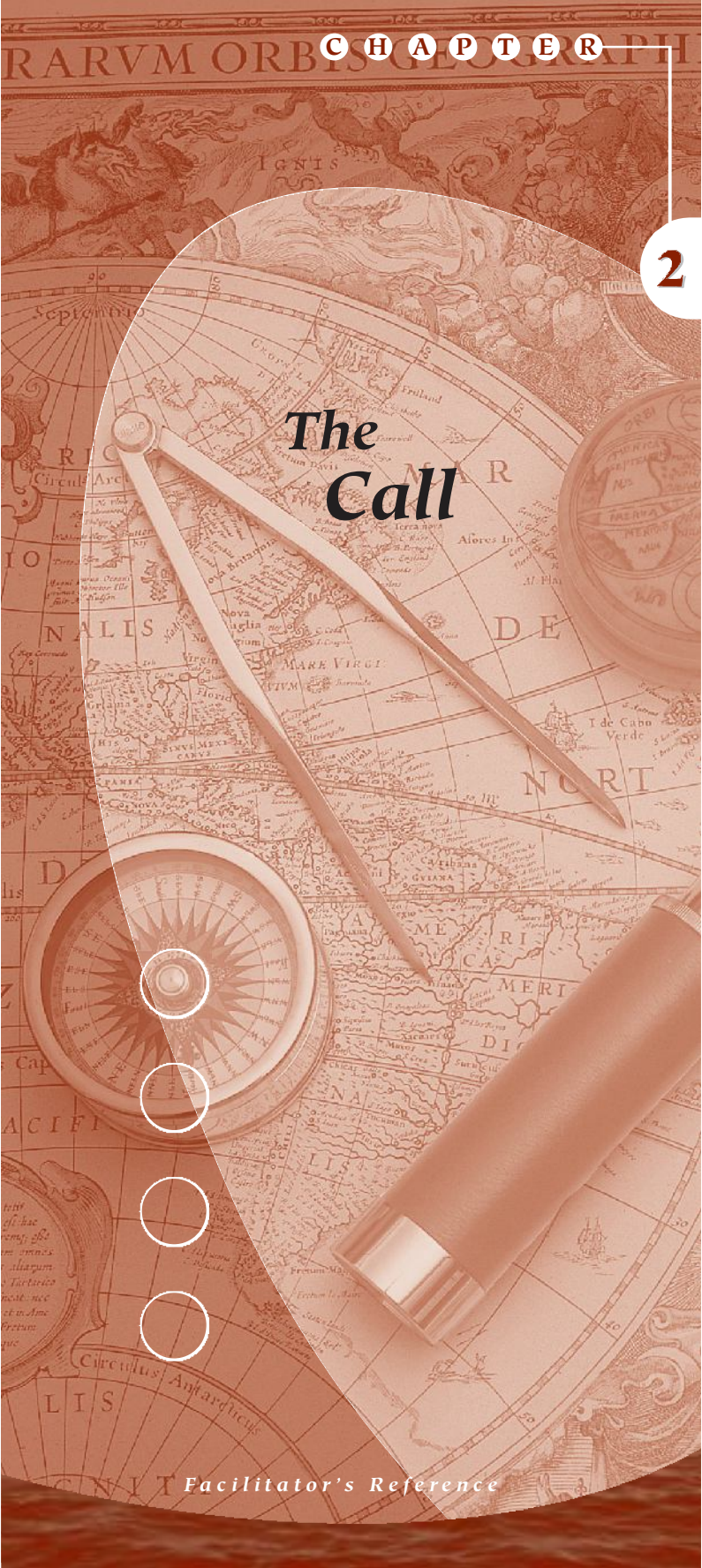
The facilitator's job is to design and deliver a well-planned process that allows the group to stay focused, make progress, generate and sort ideas, solve problems and make decisions while managing disagreements or conflict.
A facilitator does this by:

- Building a climate for meaningful conversation.
- Encouraging active participation.
- Guiding the group through decision-making.
- Helping the group track its progress by observing and providing feedback.
- **Modeling**, with your own behavior, open and honest communication.
- Acknowledging and **valuing all contributions**.
- Keeping the **conversation focused on issues**, *not individuals*.

NOTES

CHAPTER 2

The Call



CHAPTER 2

....The call *(part 1)*

You're sitting in your office and the phone rings...here it comes, the request:

"We are thinking of doing a retreat for our staff and we would like to try something different to get people talking and problem solving together. Do you have any ideas? Could you help us?"

So, who are you and why did they phone you in particular? It could be for any number of reasons such as :

- It is your actual job: You could be one of those lucky people whose practice and passion is also their full time job.
- You have a regular job but you are fascinated by facilitation and determined to build up a practice.
- You could be one of those unique individuals we call a facilitative officer or a facilitative manager.
- You have been practising facilitation for so long in your work that everyone knows your reputation and wants a piece of your action to do it right.

To get those calls you have to want those calls, you cannot be invisible so:

- Write an article on facilitation in your departments newsletter.
- Offer to speak on facilitation at various team staff meetings or stand-ups.
- Host or participate in brown-bag lunches on facilitation.
- Bring in guests, videos and colleagues to talk about the value added by facilitation.
- Set-up or seek out informal networks of fellow facilitators in your organization.

- Be honest with yourself and your client about what you can and cannot do.

- Repress the urge to talk too much on this call...listen, listen, listen....ask good questions and take good notes.
- Don't assume that you are the best one to be taking the call, perhaps another colleague would be more suited for these people.

Some good tools and practices...

- Keeping your boss up to date;
- Active listening;
- Probing questions;
- Your agenda (or palm pilot, Blackberry, etc.);
- Your notebook;
- Your "Rolodex" or whatever they are using these days; and,
- Your ability to see the BIG picture along with an eye for detail.

Okay, you took the call and you can be of help. It's time to head on to the next part.

Notes

CHAPTER 2

....The call *(part 2)*

Now we get into the nitty gritty of the call, the determination of what they really want done (sometimes they are not really sure), and your ability to help them deliver.

This is where your Sherlock Holmes skills come into play. To assess if you are able to assist your colleague you need to ask the five basic journalistic questions: When? Where? Who? What? Why?

***When?* Are you free that date/those dates?**

Here is a bit of hard earned advice from our own experience: it is not sufficient to have the actual date(s) free, you should also plan for some preparation time before the event and some debriefing time afterwards. Of course don't forget to take into account the travel time to get there and back as well. Because of our great desire to "help", we have often accepted facilitation commitments because the calendar said the date was clear and then found ourselves squeezing time in between appointments and other commitments to actually plan the event with our clients and doing the design work. This is a disservice to the client and to yourself as well.

So now, when a request comes in, we check the actual date(s) on the calendar and then flip back a couple of weeks (or months depending on how large or complex the event is) to assess whether we have sufficient planning time. If we do accept the request at that point, we will also book a couple of planning meetings with our client and block off some design time in our own personal agendas. More and more (an age thing perhaps - less energy now), we book at least one "free" day after the event to debrief, to unpack (in the true sense and also metaphorically), catch up on e-mails and calls, type up and send any necessary follow-up notes / reports and get ready for the next gig!

***Where?*: Is the event on-site or off-site?**

If it is on-site there is no need to consider travel time when you assess your availability. If it is off-site, you need to factor travel time into your commitment to work with these clients. It may be a question of hours if it is in your region or even days if it is in another province/territory. What is the impact on your schedule, other work/personal commitments and other clients?

On-site: Often this is a preferred option for clients because it is low cost and convenient for employees. The disadvantage to holding an on-site process is that you may lose players either because they may run back to their office to check messages and get detained or because they get called out of the session by those who need their expertise.

Off-site: Obviously, this alternative is more costly. Organizers need to budget for the rental of the meeting room, audio-visual equipment, travel, meals and accommodation (if it is an overnight event). The advantage to having an off-site meeting is that it takes people out of their normal routines and environment and allows them to be present in a different way and to participate more fully.

Part of your preliminary work with clients is to help them determine where to hold the event by guiding them through this reflection.

Who?

A) Who is requesting your help?

- The manager of the group? What is the motivation to having this meeting / event?
- A member of a team? Who has given him/her the authority to organize this?
- A member of an organizing committee? What is the rationale for having this event? How does this facilitated piece fit in with the rest of the event?

B) Who will be participating?

- Is this meeting for an intact team, division, directorate or branch?
- Will it be interdepartmental?
- Will it be the entire department?
- What about other stakeholders, other governments or even citizen involvement?

What? What is the purpose of the event?

Is this simply a request for meeting management? Is it an information sharing type of event with a series of presentations? Or, do we need to put in place some thinking processes to do some issue analysis, problem analysis, or decision-making? Is it for strategic planning? Or, is there a communication breakdown and we need to do some conflict resolution and consensus building?

Why? **Why are you choosing to hold this type of event at this time?** What are you hoping to achieve? What are your objectives? Am I the best suited person for this job?

To do it right...

- The first question should be "when?" If you are not available there is no point in going further.
- Have a list handy with the names and numbers of other facilitators who could assist the client if you are not available.
- Keep this call short and to the point. If it turns out that you are not available or not the best person for the job it would be unfortunate to have spent an hour of your time and your client's time only to come to that conclusion.
- This is a good time to be directive with your questions and take the lead.
- Keep the five basic journalistic questions at the back of your mind throughout the conversation to make sure you cover all the bases.

Some pitfalls to avoid...

- Resist the temptation of proposing tools and approaches at this stage - you might be painting yourself into a tight corner. It is better to wait until you have had a planning meeting with your client and get a clearer sense of *all* the players' needs and expectations.
- Saying NO is not easy for many of us (especially because we are in this profession out of a real desire to help and be of service). I have found myself being wooed by a client who appealed to the "savior" side of me: "Pleaaaase Sylvie! We really need your help with this. We are in a bind." Or a client who appealed to my "ego": "You are the best! The Director General requested you personally." "We love the work you do" etc. So we find ourselves saying yes and trapped into impossible tight time lines lamenting to ourselves "What did I get myself into?" "And I swore to myself I would not go back to this chaotic insane work pace again!" You get the drift? It is OK to put yourself first sometimes...

SOME GOOD TOOLS AND PRACTICES...

- Some people find it useful to use an initial interview template that lists the five journalistic questions and any other necessary information. The template is useful as a memory jogger for this first conversation with the client and is also a way to keep a record of the conversation for future reference.
- Block off the preparation time in your calendar as well as the actual date(s) for the event.
- Keep a list of some of the more popular / convenient meeting facilities in your area to offer as suggestions to your client. The availability of the facility may affect the choice of dates and therefore have an impact on your ability to accept the contract.
- If you accept the contract, set-up a meeting time for the planning session with the committee right away.

So now that you have got a few things straight with the caller you have to get ready for the next stage, your visit with the planning group.

NOTES

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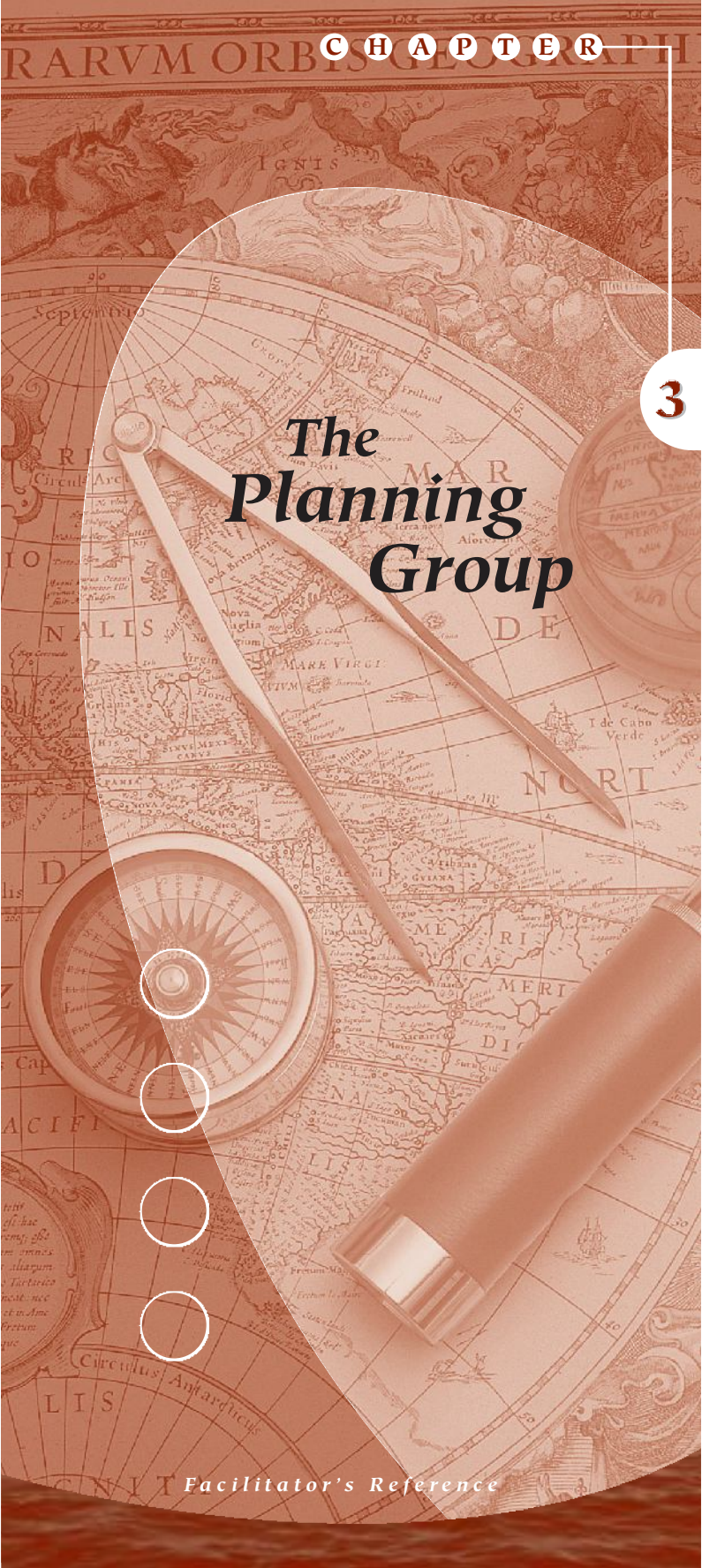
CHAPTER 3

The Planning Group



The call is usually from a spokesperson from a planning group, sent to check you out and get a feel for whether or not they really want you. So they have talked it over and have decided that yes they do want you and could you sit down with them in person or in a teleconference.

This is a tough meeting for you. On the one hand they want you for your experience and expertise. But on the other hand, they are after all, the planning group and they have all these plans...

So you have to tread carefully. You need to walk a line between helping them pull off a successful session and not getting hooked into being just another member of their planning team.

The following are some of the questions typically covered at the initial meeting:

1. *Just who exactly is the client?*

You need to clearly identify who has made the request to hold this event? Who has the authority to **plan** the event? Is it the same person who has the authority to **approve** the agenda? If the person(s) who have been tasked to plan /organize the event are not the same as those who will ultimately decide on the content and process, you will need to ensure that they are both kept in the loop throughout the planning and delivery phases.

Will the client be participating in the event? What role will he/she play; decision-maker; content expert; full participant at the same level as all the others; observer only. It is useful to define the client's expectations as to roles and to rehearse what that would look and feel like on the day of the event.

2. *What is the real purpose of the event?*

This is a tricky one and a very critical piece. Often you will get nebulous requests like: "we need to do some team building". When you dig a bit deeper you might find, for example, that there is a conflict situation which has polarized the team into opposing groups and caused a breakdown in communication. This may call for much more than "fun and lighthearted" team building activities. Or when you question the client, you may find out that what he/she means by team building is simply having all his team in the same room for one day to do strategic planning.

Watch out for the "false requests": "We have not had a team retreat in one year and we had said we would do it once a year, so I guess we have to organize something." No real need there except for the need to put a checkmark in the work plan next to the "have a yearly team retreat" column!

Getting clarity on the purpose of the meeting is the first step in the contracting process with the client. A contract can be either verbal or written (this could be in the form of an e-mail or a more formal contract letter). Choose what works best for you and your client.

3. What will success look like at the end of the day?

This is the second part of the previous question about the purpose of the retreat. You are asking your client to define some success indicators or criteria. "If X, Y and Z happens, I will leave the meeting happy and satisfied that it was time well spent."

4. What expectations will participants have of this session?

Asking the client what they think participants might expect from the meeting is another way to get clarity on the purpose and outcomes. It is also a useful exercise to inform organizers that there may be a need for context setting at the beginning of the meeting to get everyone to begin at the same place. Identify if there is a need to distribute background information prior to the meeting or at the meeting to ensure that everyone has an opportunity to become familiar with the subject at hand. Having a sense of participants' expectations also helps to identify any issues that may flare up during the meeting and plan accordingly.

5. How many participants will there be?

Numbers dictates approaches and methodologies. It is a *breadth* versus *depth* issue. It is easier to go deep into issues with smaller numbers of people. On the other hand, larger numbers allow for systems thinking tools/approaches such as the *Open Space* and *Courtyard Café*.

6. Do they all know each other?

There are traditional ways of going about **introductions** such as doing a *round robin* going around the room asking people to state their name, where they work and why they are there. It is worthwhile consid-

ering more creative ways of introducing people to each other such as a high energy networking *Bingo* or a more in-depth personal *Coat of Arms* exercise both of which serve in the double roles of icebreaker and a way of building rapport between people as they reveal something about themselves.

Will you need an **icebreaker exercise**? Ideally an icebreaker exercise is related to the topic at hand. It helps set the stage for the event either by creating an opening for people to get acquainted and/or introducing the content.

7. *What is everyone's role in the day?*

- Who will make welcoming / opening remarks?
- Who will set the context for the meeting?
- Who will describe the session purpose?
- Who will thank the participants / make the closing remarks?

As a rule, we invite the client, as host, to open and close the event to send the message that it is ***their*** meeting, that they own it - both the process and the outcomes.

8. *Will there be presentations? How many? How long? Strategically, where do they need to be positioned in the program for maximum gain?*

Watch out for this one. A series of presentations can be a problem. We have a serious malady in the public sector; we sometimes believe that retreats are the venue for information sharing through several power point presentations! There is also an overactive protocol that can happen: "If we invite the manager of this division to speak then we should be fair and invite the managers of the other three divisions, and we should also ask the Director to give an overview of the work plan. If we are lucky, we may even be able to have the Director General or even the Assistant Deputy Minister do our opening remarks. We should invite outside experts to come tell us how they do things and motivate the troops."

Our position is that if we are asking people to gather and spend a day together to listen passively to a long list of speakers, we have missed a unique opportunity to build relationships and give people a voice so they can be part of the solution. Let's not be satisfied with simply telling people change is coming - let's find ways to engage people fully, with their mind and their heart, to become the impetus for change! In short,

there are hundreds of ways of giving information that do not require people listening to a presentation. As much as possible we must try to influence the agenda to create opportunities for people to talk and think together such as small group work in the form of an *Interview Matrix*, *Cafés*, or *Appreciative Inquiry* interviews for example.

9. What background information do I need to familiarize myself with the language and the rationale for the meeting?

Ask your client how best to prepare yourself for the session. Keep in mind that any background reading you do is to become familiar with the context and the language. As a facilitator you are not expected to be a content expert - it actually helps not to know much about the content because the neutrality allows you to focus on the process and team dynamics.

10. What could go wrong? (i.e. internal conflicts, cynicism, overwhelming task, lack of skills, lack of vision, lack of leadership, etc...)

Flagging possible obstacles or glitches can help inform the choices around process. If for example, the regional and NCR groups have traditionally been at odds with each other then it may be wise to include a process to uncover differing perspectives objectively using a *Challenge Wall* or an *Issue Analysis* technique.

Have a frank conversation about some of the underlying issues that could come up during the meeting so that strategies can be developed to address them in the design of the agenda or have some "plan B"in your "back pocket" just in case.

11. What are the logistical requirements?

This question is related to the purpose of the meeting, the number of participants and the tools you intend to use. Will you need "islands" of tables and flip charts at each cluster for small group work? Do you want to forego the tables and just have circles of chairs for an *Open Space* or an *Interview Matrix*? Do you want to pay special attention to the decor to create the right atmosphere for a *Courtyard Café*? Is there a need for audio-visual equipment such as overhead projectors and screens or a CD player for background music? Do you need microphones: handheld or lapel mikes? Who will handle the rental of the audiovisual equipment?

12. *What process or tools might best suit your needs?*

The goals and the objectives of the meeting will help determine what process or tools will be the most effective. For example, if the purpose of the meeting is team building you need to include lots of opportunities to network and get acquainted such as small group work in *Cafes* and *Dialogue* sessions. More than once, we have encountered meeting organizers who claimed that the main purpose of the event was to build their team and raise morale while presenting a draft agenda that listed a series of presentations, which left only the breaks and the lunch hour for "team building" and other people stuff.

If the purpose of the meeting is to *decide a course of action* you may want to use a *Challenge Wall* to identify the issues, facilitate a conversation on criteria for decision and do a *Decision Matrix* process. A bit of experience and a well-rounded facilitation tool box will help you design a sound process.

The culture of the organization is another important consideration when choosing the appropriate process and tools. A more conservative and traditional climate may not be open to visioning exercises using creative tools such as collages and drawings. You may want to tailor the tools so they have appeal and resonance for your client group while still helping them stretch beyond their usual way of working. We see our role as change agents and through coaching we encourage our clients to push the envelope and dare to try a new approach that may result in a breakthrough for their group. Granted this stance takes some self-confidence and courage and it may not be comfortable for beginners.

TO DO IT RIGHT...

- Make sure that all the decision makers are in the room. Ask the question: "Is there anybody not in this room who can veto any decisions made in this room?" If there is, arrange for a briefing meeting with these people as soon as possible.
- Find out who is the real client. Who wants this session held? Will they be there? And in what role: observer, participant or decision maker?

- What is the underlying purpose of the event? Is it just something we always do once a year or is it driven by a current issue?
- Have a conversation with your client about what success would look like?

Some pitfalls to avoid...

- Lack of balance in the planning.
- Agenda overload of "talking heads". Make sure that there is balance between listening and having a dialogue. There needs to be some practical hands on experience through small group exercises to allow for intelligence gathering or the integration of new learning.
- Try not to overload the front end with dutiful speeches by the boss, which would be better served at the end of the day as a response to the work rather than at the beginning of the day where they may set the tone for the day.
- Be careful of the "content trap," whereby if the session is to be on accrual accounting the planning group may believe that you should be really up to speed on accrual accounting.
- Remember the facilitation value "focus on process not content". Remind clients that what you bring is process expertise and that will help them tap into their content expertise to produce solutions.

Some good tools and practices...

- We know that in planning and designing a good session we try to have balance of 1/3 information, 1/3 dialogue and 1/3 new learning.
- As you work with the planning group, be a facilitator to them. Use your flip chart, *Decision Trees*, *Challenge Walls* and brainstorming techniques to help them have a more focused and better time of planning.
- As you continue to work with the planning group you will be working towards an exceptional, one of a kind, client centered design.

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CHAPTER

The Design

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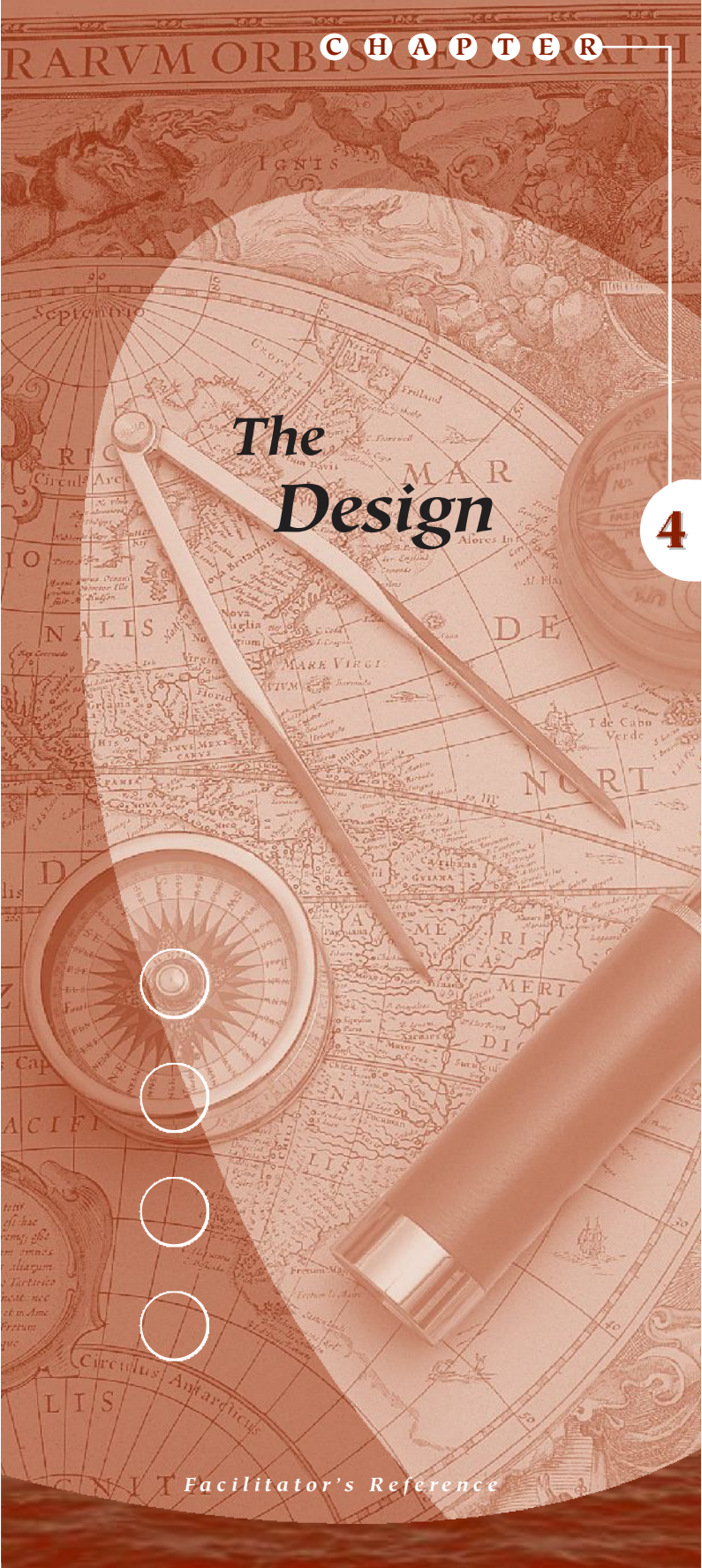


Facilitator's Reference

So you have laid the ground work. You know the players. You are very clear on the expectations and outcomes. You and the planning team have a vision of what you want. Now you must come up with a session design that will fulfill that vision.

Ask yourself the following questions:

Do we want an ice breaker to set the tone at the start of the meeting? If yes, does the ice breaker you've selected relate to the topic at hand?

Do you want to use ground rules?

This technique allows the group to self-monitor throughout the meeting by giving itself a code of conduct. You can suggest some ground rules for the group and have them agree on them and / or adapt them. A simple one we use is:

"When someone speaks, we actively listen. No side conversations."

Or, you can ask the group to brainstorm their own ground rules by thinking back on the best meetings they attended and identifying the elements that made this possible (a bit of an *Appreciative Inquiry* approach to bring forward the best from the past as a building block for the present).

What key questions will the group need to answer?

What activities/tools will be used at this session?

What process shall we use and for what purpose?

How much time will we need for each piece and have we built in some flexibility for unexpected delays?

Is there a good mix of small group work and large group plenary sessions?

How will each piece build upon each other to lead us to the desired outcomes? Is there a natural flow and progression? Does the preceding piece inform the next one? Does it set the tone?

Have we included methodologies that address the different learning styles and personality types?

Do you have approaches that will suit your *visual*, *auditory* and *kinesthetic* learners? For example, a *Challenge Wall* is well suited for kinesthetic learners (standing up at the wall and moving Post-It™ notes around in columns) and for visual learners (reading the notes and seeing the patterns emerging in columns).

According to David A. Kolb (1983), there are four types of learning styles:

- Diverging
- Accommodating
- Converging
- Assimilating.

Let's take a problem-solving situation to illustrate how to enlist the best contribution from each of these types. Initially it is important to generate as many ideas as possible with a brainstorming type of exercise and this is where the DIVERGERS are especially skilled. Then, the ASSIMILATORS step in to start organizing, sorting and categorizing the information so that it becomes easier to analyze. The CONVERGERS will help streamline the information by further identifying a few practical options and help the group make a decision on a course of action. The ACCOMMODATORS are the practical ones, and will be key in the implementation process.

How can you adapt traditional tools to suit the different personality types? You may be familiar with the Myers-Briggs Personality Type Inventory (MBTI) which proposes sixteen types of personalities (Briggs and Myers, 1995). One well known descriptor of the MBTI is the introversion and extroversion scale which describes how people get energized. *Extroverts* get their energy from interactions with the world outside of them: the people and the environment. *Introverts* recharge their batteries by going inward to reflect and process information.

So how can you address the needs of both extroverts and introverts in your design and approach to facilitation? A way to better include the introverts in an idea generation process is to first ask people to take two minutes to reflect silently on the question posed and jot down their ideas on paper. After the silent brainstorming, ask each person to contribute one idea in a round robin format and jot them down on flip chart. Then you can get more ideas by opening up a classic brainstorming session where people shout out their ideas as they please (which suits extroverts to a "T").

Have we given ourselves realistic and flexible time lines?

Err on the conservative side. Give yourself more time than you think you need to accomplish your task. It is far easier to deal with extra time on your hands (people always appreciate an extra long lunch hour or finishing early) than to back-pedal and squeeze big jobs into little time slots!

What is our disposable content?
As a rule, it is wise to build some disposable content into the design. What we mean by disposable content is items on the agenda that are not critical to the success of the meeting but would enhance it if time permits. This is a conversation that is useful to have with your client as you finalize the agenda: "Which piece of this agenda must we accomplish for you to feel that the meeting was successful? Which piece can we shorten or eliminate if there is a time crunch?"

If you have identified the disposable content ahead of time it will ease management of the unexpected on the day of the event. You can have off side (side-bar) conversations with your client (during small group work, breaks or at lunch) to gauge how it is going from his/her perspective and to discuss how to re-jig the agenda if, for example, an event has derailed the process or the group has requested more time to achieve consensus on a fundamental issue before they move to the next piece.

TO DO IT RIGHT...

- Bring examples of other successful similar sessions. In fact, give the planners some names to call and bench-mark for themselves some success stories that have had much the same objectives.

- Outline parameters such as time, space, participant numbers, protocol requirements and products to be delivered right at the beginning.

- Ask colleagues to act as sounding boards. Share with them your design and get their comments, feedback, ideas... See your design through their eyes and look for ways to improve it.

Typical Agenda

1. *Welcome and Introductions:*
   - Ice Breaker exercise (introductions)
   - Set the context for the meeting
   - Give an overview of the objectives and the process
   - Ask participants what are their expectations for the meeting
   - Set Ground Rules

2. *Short presentation on meeting topic to ensure that everyone is on the same page*

3. *Idea generation process (Diverging)* (e.g. *Open Space, Challenge Wall, S.W.O.T., etc.*)

4. *Categorize, Summarize Information (Assimilating)* Small group work often well suited for this stage

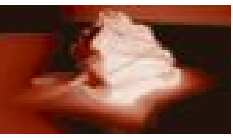
5. *Prioritizing exercise (Converging)*
   - Determine criterion to select priorities
   - Select top priorities (e.g., multi-voting, consensus building techniques, etc.)

6. *Determine course of action (Converging / Accommodating)*
   - Identify objectives for each priority
   - Assign time lines and accountabilites

7. *Next steps*
   - How will we keep the momentum going after this session? Who and How?
   - Revisit the *Parking Lot*

8. *Wrap-up and evaluation*
   - Client summarizes the day's accomplishment and future direction
   - Review Expectations
   - Participants evaluate the meeting

Some pitfalls to avoid...



- Watch out for the "agenda freaks" who have historically applied the format of the business meeting agenda to every session they do.
- Be aware that some presentations are for protocol reasons, while others are required for communication of information. You need to ask the question: "does this need to be communicated in presentation format or can this information be delivered using a *Talk Show* or a *Press Conference*.
- Be careful of relying too much on the design. As we know, the strength of a facilitated session is often in the serendipitous, improvised moments.
- At the same time, what can make or break a session is the time you spent **preparing** for it. This includes client meetings, thinking through and arranging for logistical requirement and having a solid design. There is a joke in facilitator's circles that the best designs on paper allow for the best meetings even though the meeting didn't look much like the design.
- It is wise to have two agendas for a meeting. Let us explain. One version is simple and straightforward and is meant to be circulated to participants. It is the *public* plan for the meeting. The other version of the agenda is your *Road Map* as a facilitator with process notes and reminders on logistics for each facilitated piece. It is also your *back pocket* plan where you have thought out some alternative processes or approaches in case there is some unexpected twists and turns as the meeting unfolds.

Some good tools and practices...

A good way of looking at which tool/process is best suited to the needs is to use the following model:

- Are the issues stemming from the **past**? If so, you need to do a problem analysis process to assess:
  - Where did this originate from?
  - When did it start?
  - What led to the present situation?
  - What are the impacts so far?

An *Appreciative Inquiry* process can help identify the key forces from the past so we can build on them in the present.

- Is the issue related to the **present**? Then the process has to help the group make use of decision using tools like the *Challenge Wall* and the *Decision Matrix* for example.
- Will the issue affect the **future** of our organization? Then our process has to allow us to gather intelligence and make plans. Ideally it is best to involve the whole system with a large group process like an *Open Space* to lay the groundwork for a strategic planning exercise.

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Basic tools and cornerstone processes:

1. *Brainstorming (15 min.)*

Purpose: a method to generate quickly a high volume of ideas on any topic.

Process: Start by clearly stating the central brainstorming question then ask people to call out their ideas at any time. **Write each and every idea** on the flip chart in large visible letters. The emphasis is on quantity and variety. Brainstorming is a process free of criticism and judgment. There will be opportunities to sort through the ideas (keep, alter and reject) afterwards. Expect to have some waves of input. As you open the brainstorming session you will have a surge of ideas. When the pace slows down restate the question in a different way to generate more ideas. When it slows down again ask the question by giving an image or using a metaphor to trigger even more thoughts and so on. Aim for a 10-15 minute period. Keep going if the ideas keep flowing.

A) Mind Mapping™ (15 min.) - a way of giving structure to the data you get in brainstorming.

Start by writing the question or topic in the middle of the page and circle it. Then open up the brainstorming session. Draw a line out from the center and write each idea on a different branch. As ideas are generated, facilitate a discussion around themes and categories: "Is this idea different than the last one? If so, let's give it a new branch. Is this idea a sub-category of an idea already listed. If so, let's write it below that idea. Are there any links that can be made between this branch and another on this page? If so, let's draw an arrow to and from these categories to indicate the link etc." Each category of idea is a separate branch (so that pretty soon it looks like a child's drawing of a sun. And later, as you start writing sub-categories of ideas in each branch and connect related ideas together with arrows, it looks more like a spider web). Tony Buzan (2002), the creator of *Mind Mapping*™, suggests using lots of colours, symbols and images to engage the right side of the brain. *Mind Mapping*™ is a great way to plan and strategize because it gives you the ability to organize thoughts and ideas on one single page while still capitalizing on the creativity of free flowing brainstorming.

B) *Affinity Diagram (45 - 60 min.)* - a way of organizing and summarizing natural groupings of ideas generated in brainstorming.

Start by clearly stating the issue under discussion. Ask participants to take 5 minutes to reflect on the issue and do a silent brainstorm of ideas. Ask them to jot down each of their ideas on Post-it™ notes in bold large print. **Only one idea per Post-it™**. When everyone is done ask them to come to the wall and just stick their ideas anywhere on the wall. Then, without talking, ask all the participants to sort the ideas simultaneously into related groupings. Sorting will slow down or stop when each person feels comfortable enough with the groupings. It is OK for some ideas to stand alone. For each grouping ask participants to come up with a title or a header that describes its content. These headers signal key issues that need to be addressed in order to make headway with the issue and can become the basis of an action plan.

2. *Multi-voting (15 min.)*

Purpose: a way to prioritize and/or make a decision.

Process:

- To rate the relative importance of each option, ask participants to assign their votes (in the guise of round coloured stickers or check marks with markers) to their top choices.
- Each participant **rates, not ranks** the choices by distributing a value e.g. a total of 6 points (votes) across all the options. They can distribute this value among as many or as few choices as they like. For example they can put all 6 dots on their preferred option or put 3 on their top one, 2 on their second choice and 1 on the third.

3. *Action Research (30 min.)*

Purpose: a way to assess how well a project or process is going and create a framework to deal with any concerns.

Process: Draw three columns on a flip chart or a long piece of butcher paper posted on the wall and title them:

1) *What is going well? Or, What I like about this?*
2) *What are our concerns? Or, What are areas of improvement? and,*

3) *How to address these?*

Using a brainstorming technique start by asking participants what they like and jot down their response in the first column. Then ask the second and third question. Number the items in column 2 then align and number the corresponding answers in column 3.

4. *S.W.O.T. (Strengths - Weaknesses - Opportunities - Threats) (15 - 30 min.)*

Purpose: a quick way to do an environmental scan and take stock of a situation.

Process:

- Draw a cross on a flip chart and title each quadrant: *Strengths and Weaknesses* are the top two (present picture) and *Opportunities and Threats* are the bottom two quadrants (future outlook).
- Then ask participants to brainstorm lists for each quadrant.
- You can start to do it sequentially but you may soon uncover that one idea will trigger another that belongs in a different quadrant. There is a bit of Yin and Yang phenomena that happens. What we mean by this is that often an opportunity can be the flip side of a weakness.

5. *Issue Analysis (60 min.)*

Purpose: a method to look at a situation that is vague and unstructured by identifying its many components in an organized way.

Process:

- Start by stating the issue clearly.
- Then ask participants all the ideas that comes to mind. It helps if you ask participants to start their statements with the words "How to..." Or "I wish..." Synthesize into main themes.
- Choose priorities using agreed upon criterion such as how serious, urgent or prominent it is.
- Agree on your rating system for choosing the priorities: assign letters or a weight (number 1 to 5).
- *Multi-voting* can be used to pick top priorities. Finally, establish the next steps.

6. *Force Field Analysis (15 - 30 min.)*

Purpose: a way to anticipate problems by assessing **forces for** and **forces against** the accomplishment of a task or initiative.

Process:

- Write down the task or initiative you want to analyze on the top of a sheet and draw a line down the middle.
- Title the left column "Driving forces" and list all the reasons why this might work.
- In the right column, titled "Restraining forces" list all the obstacles or hurdles you might encounter. It may help to review the positives in sequence to see if there are any corresponding negatives and align the forces next to each other.
- To assess the importance of these forces, you can go through the list and assign each force a value - either an A, B, or C priority or a number on a scale of 1 to 5 (five being top priority). This comparison helps prioritize and determine which forces need to be acted upon.
- Finally, identify and assign the appropriate actions.

7. *Gap analysis (60 min.)*

Purpose: : a way to assess what is missing so we can get to where we want to be (often used in strategic planning after achieving consensus on the Mission and the Vision Statements).

Process:

- We are asking ourselves 4 basic questions:
  - Where are we now?
  - Where do we want to be?
  - What is the gap? What is missing? and,
  - How will we address it?

There are many ways to approach this but we like to use a simple kinetic approach:

- Position four flip charts, one in each of corner of the room.
- Title each flip chart: Maintain, Improve, Discontinue and Introduce.
- Ask participants to reflect on the present state of affairs and the future they are envisioning.

- Then ask them to think of the activities, programs, services, policies, etc., that are in place now through the following lens:
  - **Maintain**: In their opinion, what do we need to keep doing the same because it will help us get there?
  - **Improve**: What do we need to keep doing but in a different way (new and improved or more of...)?
  - **Discontinue**: What do we need to stop doing because it is not in line with our vision?
  - **Introduce**: And finally, what is it that we are not doing now that we need to start doing to get on track?
- Ask participants to pick up a marker and walk to a flip chart and write their ideas on the appropriate flip chart.
- In plenary, review each flip chart to check for clarity.
- Then, as a second step ask participants to look for emerging themes and list them on a flip chart.
- Take a second look at that list and check for overlap.
- Agree on a final list of themes.
- These will become your key results areas - the areas that require action so that the group will be in a position to attain the future you have envisioned.

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CHAPTER

The Contract

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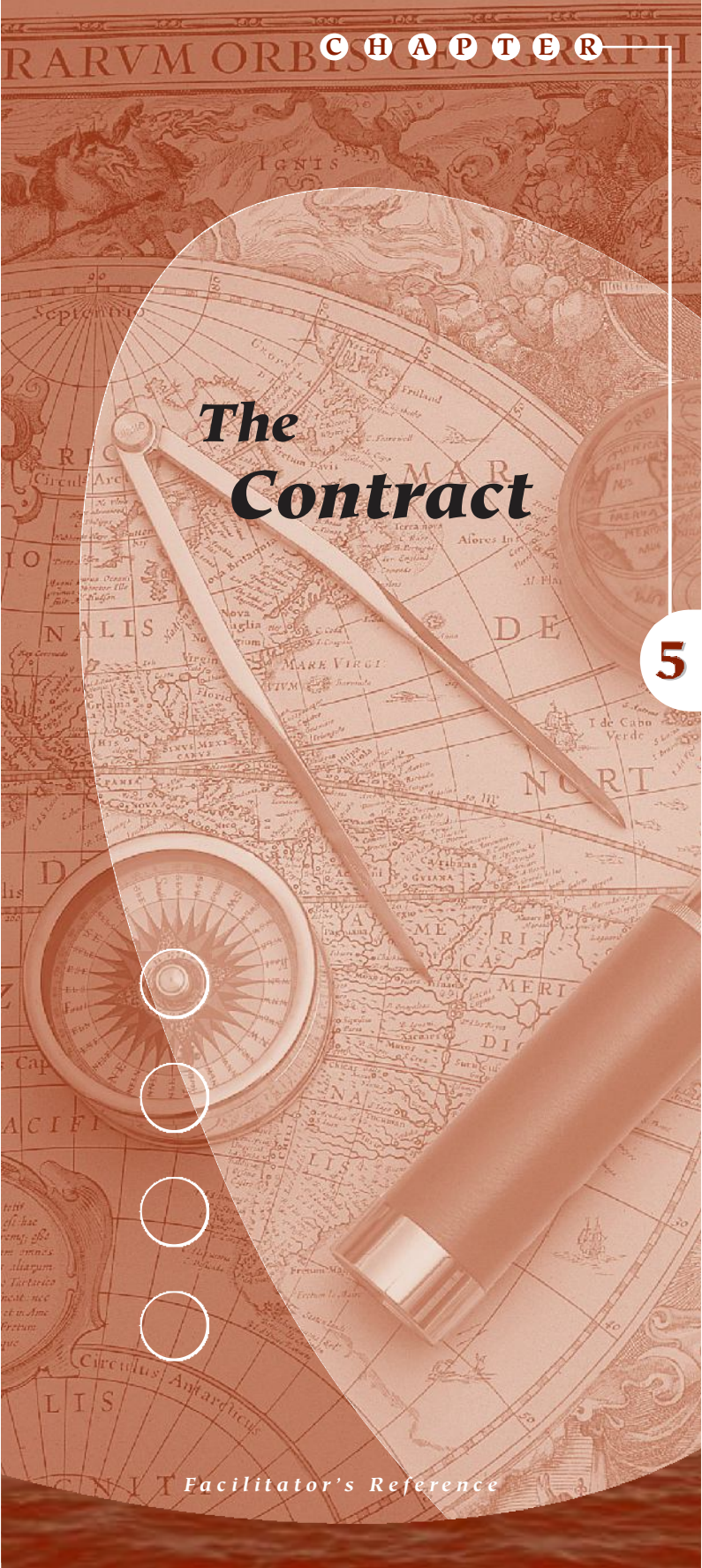

Facilitator's Reference

As internal consultants we are constantly looking for ways to build credibility in our organizations. One of the ways to do this is to conduct our business in a more business like fashion. When our organization hires an outside contractor they make a contract. Why not have a contractual agreement with us as well?

A contract is not meant to be onerous but it does provide three important things; clarity, accountability and commitment.

To do it right...

- Get all the logistics into the contract; date, place, times etc.
- Agree on the product to be delivered.
- Agree on the pre-work required.
- Agree on an evaluation process.
- Determine who is responsible for getting the audio-visual aids.
- Specify who is responsible for the print material delivery.
- Specify who will be the liaison with the facility and arrange for room set-up, lunches, etc.
- Identify who will do the follow up work i.e. typing notes from the session, and distribution, etc. Will there be pre-assigned note-takers?
- Clarify the role of the decision makers.
- Clarify the role of the facilitator. Will we need other facilitators for the break-out groups? Who will recruit them? Who will train them?

Some pitfalls to avoid...

- **Don't** be excessive in the contract, but be thorough.
- **Don't** get hooked into being held responsible for what they need to take charge of.

- **Don't** take things personally. You are there for a purpose - to facilitate a process. You are a hired gun only. It is their meeting and this thing will only work if *they make it work*.
- **Don't** let anyone mess with your tools. Be prepared to be flexible on design but remember some of these techniques work by virtue of their design and principles.

Some good tools and practices...

- Create a contract template in your word processing system and bring a hard copy to your client meeting to complete by hand. Photocopy it on the spot and leave a copy with your client or, type it up when you go back to the office. Give a copy to your client and keep one in your file.
- If you prefer a less formal approach draft a quick e-mail summarizing the agreements you have made with your client (this can become a model for future client contracts that you can cut and paste as needed).

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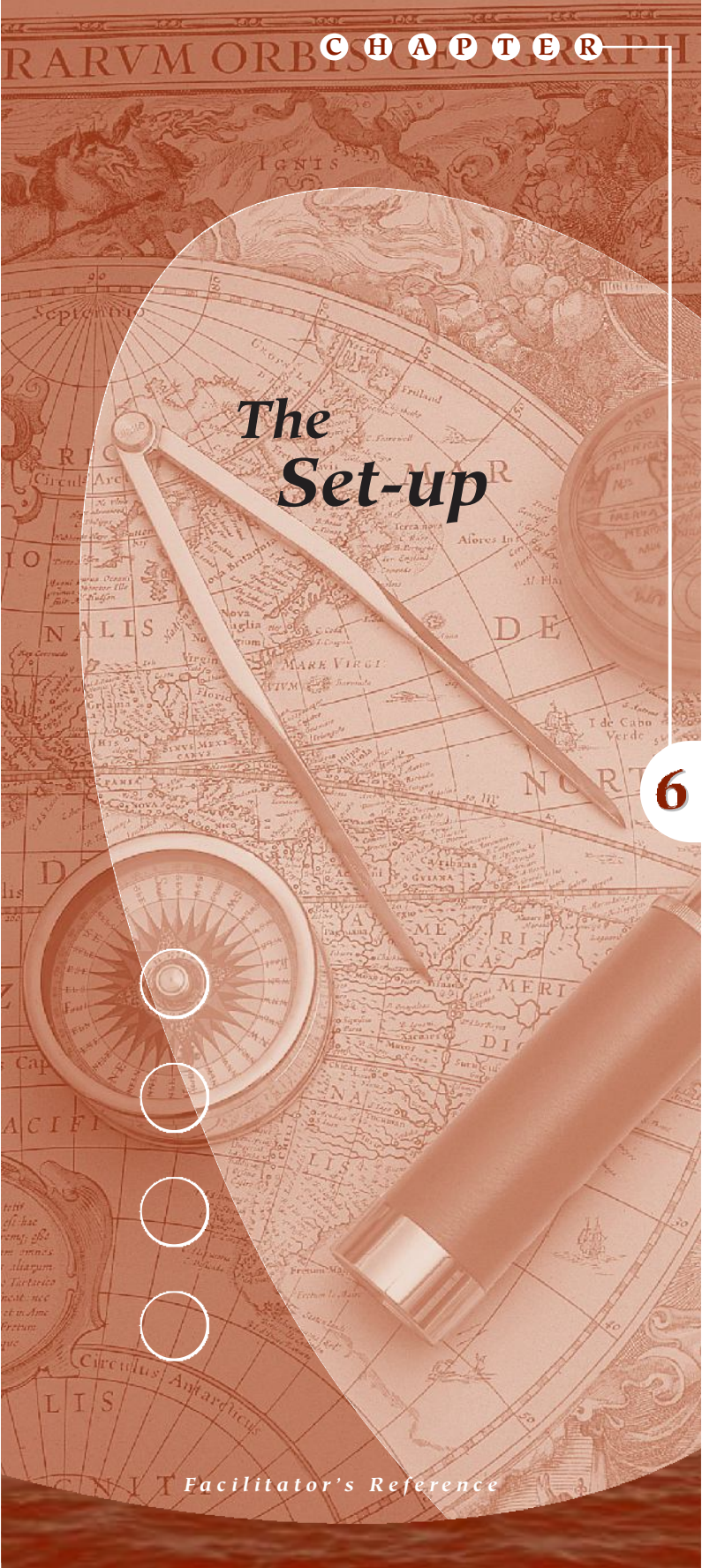
CHAPTER

The Set-up

6



Rooms can make or break an event. Once again it wouldn't hurt to remind ourselves that there is a huge difference between a facilitated thinking session and a formal meeting. Your role is to help create a space that assists us to reach our goal of "facile" (simple). You are helping to create a learning space, a thoughtful space and a creative space. You are creating a container for dialogue. The choice of room, of furniture, lighting, accessibility and environment all have a role to play in the success of your session. The movement of people and their comfort are key factors that contribute to the creation of a space for facilitated thinking.

To do it right...

- Think about the reasons for choosing your location (on-site or off-site).
- Visit the location before the event.
- Think about how the room will be set-up (theatre style, islands, in the round, horseshoe).
- Do you want tables or not?
- Pick a room that can accommodate your seating plan.
- Pick a room with good acoustics.
- Is there sufficient wall space to work on?
- What are the audio visual needs? Overhead projector, screen, lap top computer, microphones, etc.?
- What supplies are required? Flip charts, markers, masking tape, note pads and pens, etc.
- What about food? Breaks? Lunch catered or on your own? What kind of food (healthy, planned around a theme, e.g., international cuisine, choices for vegetarians or other special needs)?
- Will we give handouts? What and why? how many? printing / photocopying?

Some pitfalls to avoid...

- Be wary of too much reliance on audio visual tools, but if you need it, try to be as inobtrusive as possible. Make sure you have allowed for the extra room the audio-visual equipment will take up.

- Be careful of the "hotel trap". If you need to go off site, suggest a little creativity. Instead of a hotel or resort, why not a place of learning such as a college or university, a library, an art gallery, or maybe a local drop-in center? Better thinking happens in a real environment rather than a contrived environment.
- Does the venue have a ridiculous "don't put anything on the walls" policy?

SOME GOOD TOOLS AND PRACTICES...

- Have a good conversation about the "on-site versus off-site" decision, keeping in mind the benefits of being off-site (away from the office, distractions, etc) versus the benefits of on site (creating a thinking space in your own workplace).
- Visit the venue before any firm decision is made or contract is signed. No one looks at a room quite like a facilitator:
  - Is there enough wall space to put up flip charts?
  - Is it the right configuration for the set-up we are planning (i.e., can it fit 150 chairs in a circle in the middle of the room for an *Open Space* or can we set-up in four corners with 40 chairs in a circle in each, for an *Interview Matrix*?, etc.)
  - Does it have the right feel? Is it the right environment?
- Hotels tend to quote the number of people that can be accommodated in a room based on traditional set-ups like theater style or boardroom. We have learned that it is a good practice to request a room for 50% more people than you are expecting. For example, if the session is for 40 people, we ask for a room that will accommodate at least 60 people, which allows for enough space to do flip chart work and move around between tables.
- Introduce yourself to the hotel staff and scope the place out beforehand. It can come in handy to know who to talk to if you get a sudden brainwave and want to change the room set up at break or if you want to find candles because it would give such a nice atmosphere to your *Café*.

- On the day of the event check **all** audio-visuals.
  - Do you have extra light bulbs for the overhead projector?
  - Can people see the screen from the sides of the room?
  - Do the microphones work?
  - Is the sound level well adjusted (so you don't hear that ear piercing sound if you get too close to the receiver). Do you know how to turn the lapel mike on and off?
- Aim to be there bright and early (an hour or so before the event is ideal) so that you can trouble shoot if need be (Darn! The hotel has set up the room theater style rather than with islands of round tables), greet people with a smile as they arrive; and, take a couple of minutes to breathe deeply and center yourself before it starts.

NOTES

CHAPTER

Your Tool Box

7

Before we even start here, there is one axiom you must live and die by as a facilitator.

"Do not assume anything."

"We know the planning team agreed to supply Post-it ™ notes but gosh there was a mix-up in communication and that Peter forgot them and the session is starting in ten minutes and I am so sorry..." Even if the planning team agreed to provide the supplies for the session, there are always items that may be overlooked.

When you find out what is missing, it is time to pull out your magic (assume nothing) tool box which contains:

- Markers
- "Sharpie" pens (Fine Point markers for writing on Post-its™)
- Post-it ™ notes
- Painter's tape (green masking tape found at any hardware store)
- Ribbon or paper streamers (for wall and room dividers)
- Ball point pens
- Extra templates (for the *Interview Matrix, Open Space,* etc.,)
- Balloons and plastic holder stems
- Voting dots (round stickers).
- Thumbtacks
- Multi-purpose tool (for quick repairs of flip charts, etc.,)
- Your own little reference books
- Timer
- Digital camera (great for capturing participants in action and especially good for capturing all of the flip chart pages so you do not have to carry them all back to the office)
- Candy / Treats – adds to the sense of a special environment where the participant's needs are cared for.
- Advil™...just kidding...maybe not...

Get used to having this kit with you at all times. Buy some plastic or soft sided pouches or even a toiletries bag to stash everything in. (A plastic tool box works well especially if it is used mostly for on-site sessions and you don't have to carry it around in planes, etc.) Keep your kit well stocked and with you in your briefcase or bag everywhere you go. One day you will thank us for this....

CHAPTER

The Show

8

So today is the day. You are well rested, you have just polished off a good healthy breakfast and you are at the venue at least an hour before show time. You are well prepared. You have reviewed the design of the day and the process tools you are going to be using.

You are the facilitator, but more importantly you are the role model for the day as well. If you are an active listener your audience will try active listening. If you request input from everyone, they will start to value everyone's participation. If you poke a little fun at yourself they will also start to loosen up a bit. If show them respect, they will respect each other's contributions.

You have a pocket full of tools, a head full of ideas and a heart full of passion that you can access all day.

Be a model...

A meeting is all about communication. Your job is to ensure that the communication channels are open and that everyone has an opportunity to speak and be heard. To set the right tone for the meeting you therefore need to model open and honest communication by:

- **Paraphrasing:** "Let me restate in my own words what I heard you say to check if I understand you correctly..."

- **Mirroring:** Restate the words that were said. "You have just said... in this manner." You can also comment on the tone in which they were said. Read the non-verbal cue and name it when appropriate (facial expression and physical demeanor). Sometimes it is useful to describe the non-verbal communication of an individual: "You seemed to have a question mark on your face when so and so was speaking..." Or name the non-verbal cue you have observed in the group as a whole: "It has been a long day and I can sense that the energy has dropped in the room. How about we take a quick five minute stretch break to re-energize before we move on to the next piece?"

- **Summarizing:** "Now let me recap what has been said in the last few minutes and check with you where that leads us."

- **Open-ended Questions**: ask open-ended questions (as opposed to closed questions that can be answered by a yes or no). For example:
  - "How would you like to proceed?"
  - "What are some of the options?"
  - "How do you know you have been successful?"
  - "To move forward with this project, we need to pay attention to..."

- **Being non-judgmental:** "I appreciate that you have a different point of view - let me confirm that I have captured your thoughts correctly on the flip chart".

- Ask for and encourage **different points of view**: "We have heard from many of you supporting this idea. I would like to hear from those of you who see it differently? What are some other ways of looking at this?"

- Watch your **non-verbal behavior**: Raised eyes to the ceiling and a big sigh as Joe takes the floor for the tenth time in the last hour hammering out the same point is a pretty clear message to him and the rest of the group! Even positive signals like nodding and smiling can be judgmental. They could denote how you personally assess an opinion or concept. Comments like "great idea!", or "right on!" would indicate that you support what was just said. If other participants do not hear such words of encouragement after their input they could deduce that their idea had less value in your eyes. **Remember, a facilitator is neutral to the content!**

- **Testing frequently for understanding of basic assumptions and agreements**: "We are about to decide the work priorities for this project and we have identified that X, Y, and Z will be the criteria that will guide our decision. Is there anything else we need to do before we are all ready to move to the next stage?"

Encouraging participation

There are many ways of doing this. The following are a few tips and tricks to encourage participation:

- The type of **questions you pose** (more open ended questions than closed).
- **Non-verbal cues** (making eye contact, smiling and nodding).
- Use of the **physical space** (walking around the room or reconfiguring the room to be more conducive to active participation and networking).
- Use of "**silence**" (for those of us who are extroverts it can be very difficult to respect the moments of silence in a group. Our tendency is to jump right in and make a comment inviting people to talk. For the introverts, that silence can be key in helping them reflect to formulate their ideas and response).
- Use of **techniques** that appeal to different **learning styles** (e.g., visual vs auditory; divergers and convergers).
- Use of new **participatory tools** like an *Interview Matrix* or a *Café* which give everyone an opportunity to give input.
- Use of approaches that can **ease the discomfort of interacting** in large groups such as breaking up into small discussion groups: "In your small groups, take 10 minutes to brainstorm on this topic. We will then regroup and ask you to share with the rest of the group what you have come up with."
- Choosing to **redirect questions or comments** to other members of the group and inviting them to respond. Often participants ask questions or voice concerns directly to the facilitator because we are seen as the leader and they expect us to give them direction and guidance. Sometimes giving an answer is appropriate (but be careful to not step into the role of consultant: "In my esteemed opinion you should do this..."). Other times, redirecting the question to the large group is a good technique to solicit a wider range of input and reinforce the message that *they* own the process and the outcome: "Mary said that she is not convinced that we have looked at all the angles of this issue. What is your sense?"

- **Encouraging non-vocal participants**: "I haven't heard from the folks in the back of the room...what are your thoughts on this please?"
- **Taking care of the relationships**. Strive to interact with the participants in a respectful and **supportive manner** so that a climate of trust can be established. Ideally, you want to create a space where people feel they can take risks and voice strong opinions or different points of view. You may have to act as a referee sometimes if emotions run high and there are personal attacks. Remind people to distinguish between the message and the messenger. It is the ideas we have an issue with, not the person.

The Art of Flip Charting!

Some principles to follow:

As you create a container for meaningful communication, you need to chart what is said and agreed to. A good rule of thumb is to make everything ***visible*** and ***clear***. It is important that you record the input *exactly* as it was given to you so that participants *see* that their individual opinions are being considered and that each has had the opportunity to contribute. Ensure that you accurately record the input given to you ***word for word***. If the input is lengthy and there is a need for paraphrasing confirm with the participant that you have accurately captured their "thought". Or even better still, ask them to summarize the essence of what they've just said in ten words or less: "Give me the headline for what you just said please." If you choose to abbreviate words or use acronyms, check participants' understanding and get their OK.

Some tips:

- Write legibly - big letters in a dark colour marker.
- If you like using colour, use two colours in alternation to distinguish visually between two ideas.
- Leave space at the top and the at bottom of the pages.
- Use symbols and drawings (for your visual learners).
- Title and number the pages as you go (e.g., mission statement, p.2).

- Tear off pieces of masking tape and stick them to the side of the flip chart stand for quick access when you need to post the paper on the wall.
- Post the flip chart paper in sequence on the wall so that you can find the logical thread of thought when you refer back to them.
- It is really useful to have two flip charts at the front of the room to work with. When one sheet is filled, move to the second flip chart and start writing so that the flow of ideas is not interrupted. Have a volunteer post the filled flip chart paper on the wall as you go.
- Assign responsibility for collecting and keeping flip charts at the end of the small group work and at the end of the day (this may have been discussed ahead of time in the contracting process with your client).
- The more opportunities you can give participants to do their own writing on the flip charts the better. It ensures that the output is captured exactly as they want to express it and it reinforces their ownership of the data and process.
- Printing in block letters is best. If using cursive writing, be sure it is legible.
- Abbreviations can be used, but be careful to use abbreviations that are clearly understood by everyone, and will remain clearly understood when you go back to finalize documentation (especially important in public service departments that rely heavily on acronyms).

CHAPTER 8

The dreaded clock...

So, you are modelling open and honest communication and you are keeping track of what is said on flip chart. You have a good design for the meeting and you are following your plan. How do you make sure to stay on track? Watch the clock!

The way you manage your time depends on your style of facilitation, the culture of the group you are working with and the projected outcome for the meeting. For example, you will need to have a tighter rein on time if there is a series of presentations to go through or there are tight time lines to deliver a detailed strategic plan. On the other hand,

you can afford to be more relaxed with time lines if the purpose of the meeting is to do some team building and the mood in the room is playful.

It is also a question of *style*. Some of us like to follow the plan to the letter and complete the task within the specific time slot allotted on our agenda. Others will work in blocks of time (quadrants or half days) determining in general where they want to take the group and in what way, leaving lots of flexibility to adapt to the group's needs.

One of the key abilities of a facilitator is to be *able to think on their feet*. Because no matter if we are more comfortable working with slots of time minute by minute or if we are more liberal in our approach to time management, there will almost always be situations that call for a rethink of time and/or process: A couple of scenarios: "The ADM exceeded his allotted time by 10 minutes and then the Question and Answer Period took an extra half hour. How will we recoup the time from the rest of the agenda?" Or, "We had thought that 45 minutes would be enough time to get consensus on the Mission Statement but it seems we hit a bit of a snag, there is a fundamental issue the group needs to resolve before we can proceed. How do we make time for this conversation? Which piece of the agenda will need to be shortened or eliminated?"

A little dose of PREVENTION can limit the impact of these situations.

- In the *contracting phase* of a facilitation request it is important to get clarity on the objectives for the meeting and on the client's definition of success (success indicators). In the *designing phase*, choose processes based on their suitability in terms of time and achieving desired outcomes (i.e., you need a good two or three hours to do an *Open Space* but you can pull off a *Challenge Wall* in less than an hour):
- Once you have designed a process for the meeting, get agreement from your client about which piece of the agenda must be accomplished for him, or her to be satisfied and which piece could be seen as "disposable content" (i.e., nice to have but not critical to the success of the day).
- When you design a process give yourself some flexibility around the time lines. Be conservative and

allow for more time than necessary so that you have a buffer zone if you hit a few glitches. If one piece takes longer than planned, you can borrow time on another that was accomplished with time to spare.

- If a series of presentations are planned, put in place a process to keep speakers on track: e.g., prepare a template that each presenter will follow during their presentation; ask presenters to keep their overheads down to only five; or, ask presenters to prepare a one page overview of their presentation to hand out to participants so they can cover only the highlights / key points in their presentation; etc.,). Also determine if it would be useful to appoint an official timekeeper to sit at the front of the room and give a pre-determined signal when five minutes are left and when the time is over.
- Brief your client and the presenters ahead of time to explain the process and emphasize the importance to stay within the allotted time.

During the day there are a few CURATIVE approaches to time constraints:

- ***Think on your feet!*** That is where experience comes in handy...: "Let's shorten the periods of conversation in this *Open Space* from 45 minutes to 30 minutes to keep things moving along and catch up lost time"; "Let's try to build consensus amongst the members of the small groups before we tackle the large group"; "Let's fast forward the small group debrief by asking each group to share just one bright idea instead of flipping through their flip charts and give us a play by play verbatim of their discussion?" (We will assure them that the flip charts will be collected and typed up so that we won't loose all the good stuff they generated in their small group); etc.

- If adaptation of the process and/or time is necessary involve the group and your client in your decision. If there is a time crunch, invite the *group* to put forward some options:

  "It seems like this conversation about the new policy is very important to many of you. We had planned 30 minutes for this part of the agenda and we have already taken up 45 minutes. We can make time for

this conversation if your sense is that it is critical to our success here today or we can move on. The choice is yours. If we do take more time then how shall we proceed with the rest of the agenda? Any suggestions?"

- It is also important to keep your *client* in the loop when you make decisions to change the process or the time allotment. Give your group a 5 minute stretch break and huddle with your client to decide your next course of action. Take a few minutes at lunch to speak with your client to gauge his/her satisfaction with the day so far. Based on that feedback, offer to make changes to the process/time if necessary.

- The ***"Parking Lot"*** concept is another helpful time management tool. If a point is raised that is off topic or too complex to resolve in that forum, you can offer to note it on a separate flip chart posted on the wall, the *Parking Lot*. If you do so, assure the participant that all the items on that list will be revisited at the end of the day to decide how to deal with them (i.e., set up a meeting of interested parties, send an e-mail for input, do more research, etc.). The message here is: "We heard you. Your input is important and we will write it down on the wall so we don't lose it. We will talk about how to address your concern/ suggestion at the end of the day."

- Tips to get to ***consensus***. Ask the group how they want to make decisions. If it is by a majority vote then consensus building is a non-issue. Push for consensus because it is in line with a facilitator's principle of participatory decision making and valuing everyone's contribution. Ask the group to agree on a definition of consensus and post it on the wall. Sometimes it is difficult to get to a consensus and gauge the buy-in of everyone in a large group. A good way to approach this is to break the larger group into smaller groups and ask the four or five individuals in each of the groups to agree on a statement of priorities. Then pair up two small groups and ask them to share their outcomes and agree on a position that suits all of them. Continue until you have got two positions to present to the large group to gain consensus. In this way, you build consensus one group at a time with increasing numbers of people.

A Final Note

Concluding a Session

And finally as a wrap up for any meeting you should:

Revisit expectations
- Have we done what we set out to do?
- Have we addressed your hopes / wishes for this meeting?

Talk about **Next Steps**
- You, or preferably the client summarize what was accomplished.
- Chart requests and promises.
- Ask group for next action steps as follow-up to meeting.
- Assign time lines and accountabilities.

Do a **meeting evaluation**
- "Plus & Delta" group exercise.
- Individual written evaluations.

Why do an Evaluation?

Four important parties require that an evaluation be done after every session.

- First of all, **you** need it. As a continuous learning facilitator, this is your learning feedback and improvement strategy.

- Secondly, your **client planners** need it. They need to know that their hard work was well received and how they can improve on the next sessions.

- Thirdly the **bosses** need it. Politically speaking, the evaluation is the key to getting the decision makers on side as to the use of facilitation techniques in the workplace.

- And finally, all of our **facilitator colleagues** in the workplace need it. Without continuous evaluation, feedback and study, facilitation will continue to be seen as the "soft sister" in organizational change. We know that is not the case and facilitation is far and away one of the most critical factors in people and

knowledge management. Good evaluation stands for involvement of front line intelligence.

That being said we do not have to go crazy on evaluation design. We find that people do not want to spend a lot of time on filling out a form, yet they want to have the opportunity to express how they feel. We have found that a simple three point evaluation sheet works the best.

1. What went well today?
2. What did not go so well?
3. Next time we could...

Letter of Appreciation/Thanks

Again, more on the political front but important to the work; if you have had a good session, ask the host to have the senior decision maker write a letter of thanks and recommendation to your manager. This is good for the ego but even better for the world of senior management as they start to communicate with each other about the added value of facilitation.

TO DO IT RIGHT...

- Facilitation is as much about BEING as it is about doing. Your design, your process, and the tools in your back pocket all contribute to the success of the day. Even more important though is WHO you bring into the room - you. Can you model open communication? Can you help create a sense of trust in the room? Can you inject a little fun? Can you read the energy in the room? Can you admit when you're stumped? etc... Be conscious of your strengths as an individual and build on them. Be on the look out for situations that bring out your weaknesses so you can find ways to compensate for them.
- We know, we know...you will groan and say this is too "touchy feely", but you have to trust your instincts! Listen to your intuition. If you are sensing that something is not quite right, stop and reassess your course of action. When those red flags appear and you are faced with a choice, - you can't go wrong with trusting the wisdom of the group.

- The group owns the process and the outcomes. Sylvie likes to tell the story that she is like a travel agent. I have come up with a road map to get us to our destination but the group is in the driver's seat and if they wish to take the scenic route or break speed limits on the highway it is their choice. They can even change their mind about the destination!

Some pitfalls to avoid...

- **Over-relying on your design** and process to pull you through tough spots. In those cases flexibility and humility is really the name of the game.
- Like it or not you have an outcome to deliver in a defined period of time. It is easy to get side tracked only to find that time has ran out. **Keep an eye on the clock!**
- Having a **series of presentations** back to back in any meeting is a sure way to get off track with time (not to mention that it is not very conducive to active participation and networking!). If at all possible flag those concerns to your client and suggest alternate ways to share information. And, if all else fails, plan a process that would help limit time slippage such as developing a template for presentations or devising a silly way to let people know they are out of time like ringing a cow bell or waving a big red flag so that the mere thought of it is enough of an incentive to be brief (smile!).

Some good tools and practices...

- **Preparation is the key**: meet and talk with your clients - several times! - before the event so that every one is kept in the loop and is crystal clear about the objectives and the process that will lead you there.

- **Watch other facilitators at work** and make notes about how they model open and honest communication, how they manage their use of flip charts and how

they keep track of time; and steal shamelessly whatever could enhance your performance as a facilitator! Facilitation can be a lonely profession so seize any opportunity to learn from others by offering to co-facilitate, assist or observe one of your colleagues in action.

- **Balance your Yin and Yang.** Take workshops in areas that are not so comfortable for you. Some of us come from a psycho-social background that makes us very comfortable with the human dynamics element of facilitation but not so skilled at the left brain type of activities like strategic planning. Others come from a business and scientific background and have the knack for logical and sequential processes but may feel uneasy with heavy duty personal conflicts and emotional outbreaks. Take stock of what you know well and do well. Then seek out opportunities to be trained and skilled in your weaker areas so that you have a wide variety of tools and approaches to offer your clients. Strive for a balanced perspective and a balanced skill set.

Notes

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CHAPTER

The Follow Through

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If the practice of facilitation has one major complaint from the people we serve it is probably in the area of follow through. How often have we heard people say, "Oh sure! we did this all before. We put all sorts of flip charts on the wall but in the end nothing happened. Nothing changed."

It is an old lament and we have to take it seriously. We need to put new ideas and new energy into what happens after our good facilitation work.

Implementation

A good facilitation session is primarily about thinking and knowledge management. These sessions cannot and should not occur in a vacuum. There was, of course a lot of thinking and work done prior to your session and we have to capture and honour that. It is important to realize that the work is not done, it is only beginning in many ways. Most critically there will be more thinking, planning and implementation following this session and we must honour and call for accountability on that.

The simple stuff first.

Collecting Completed Flip Chart Pages

Make sure you are clear in your contract around the issue of collecting the material off the flip charts, taking it back to the office, typing up the draft and getting it out to the participants for comment. Many facilitators believe this is a part of their work. We recommend that you turn this work over to your sponsor. After all, it is their work and the burden of implementation is on their shoulders not yours. Assist them in gathering the material, sorting it and cleaning up the scrap. Offer to be on the routing list to review the draft and to give comments upon request.

Next Steps

Many facilitators take some time at the end of the session to help the group strategize the follow up, including report design and next steps. As well, many facilitators are offering to come back for follow up client meeting (shortly after and perhaps three months down the road) to offer suggestions, advice and support as the client begins to manage the implementation process.

To do it right...

- Get it clear in the contract.
- Use your experience to assist the client planning the implementation process.
- Schedule the follow up meetings as soon as possible.

Some pitfalls to avoid...

- The "oh you are so good at this, why don't you do it?" syndrome. It is flattering to the ego, but consider the benefits of building capacity within your organization by offering to co-facilitate with someone who wants to learn or, if you are lucky, letting a less experienced but skilled facilitator take it on so they can become more confident. You can offer to coach and advise. You don't necessarily have to be the one doing it.

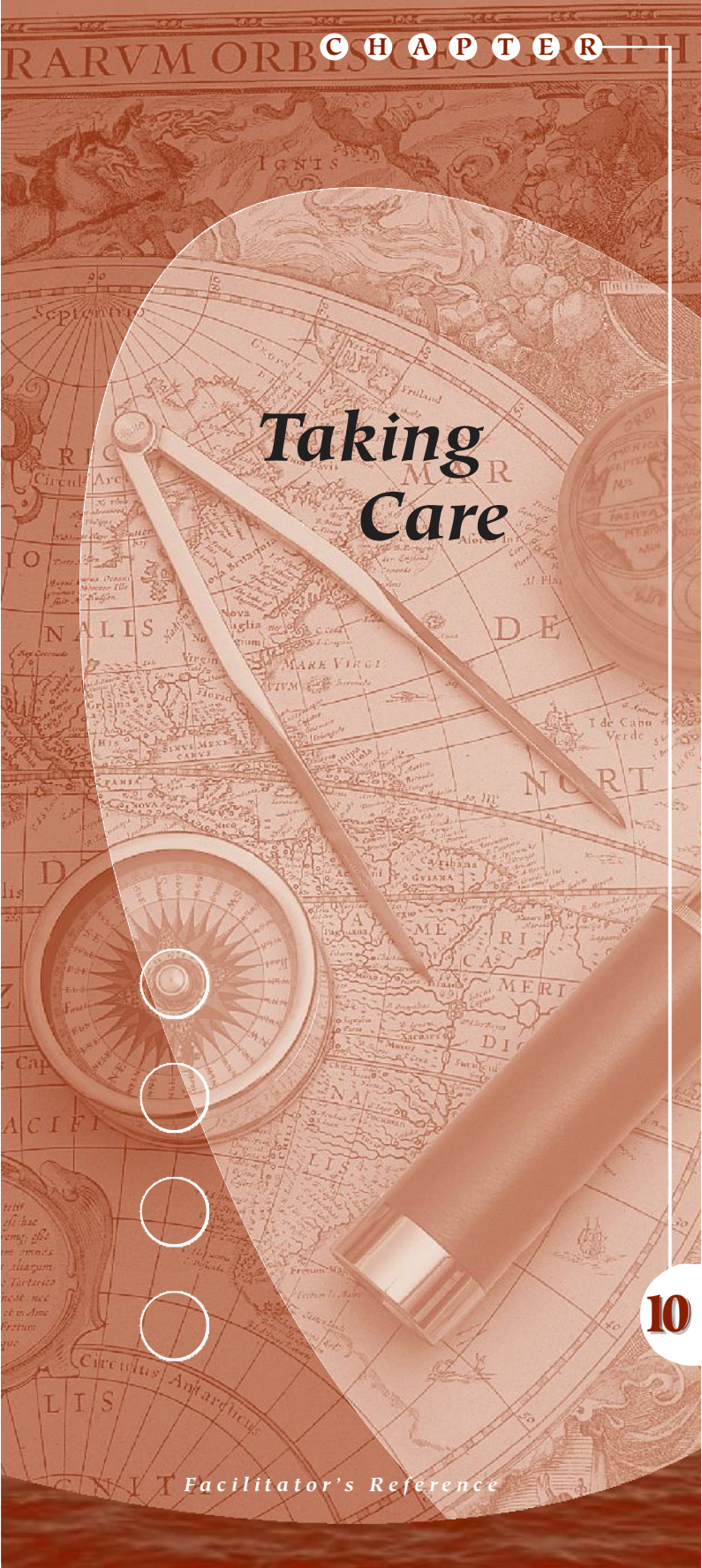
Some good tools and practices...

- The *Workout* tool has a clear next day decision making capacity. It is a good model for problem solving facilitation.
- Laptops in the room allow for quick access to existing reports, research. As well, the new flip chart work and recommendations can be developed into a working format right in the room.
- The "third, third, third" model of recommendations review brings a sense of realism to the work. Generally with recommendations, one third are ready to go, one third are good but will require more in depth work and the final third will probably never get off the ground due to fiscal, legislative or some other challenges. Coach your leaders in this model.

Notes

CHAPTER

Taking Care



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This work lives or dies based on two primary factors. The first and most important is the knowledge and energy level of the practitioners. Without practitioners, there is no work being done.

Secondly, we must recognize that the attitudes, values and support of the organization (expressed primarily through management) will determine the life span of our work. In the past when times got tough, what usually got cut?

So, we have to take care of two important things...ourselves and the work.

Taking Care of You

This work is in many ways a paradox. On the one hand it can be emotionally and physically exhausting and frustrating. Many practitioners experience the onslaught of burn out too early in the game. On the other hand it can be personally enriching, uplifting and highly satisfying.

All jobs require taking care. Work-life balance has been one of the hottest issues in the last decade. But, be aware, this work requires even more attention to this balance. It is especially difficult as you experience success. Demands will increase. You will feel great about those successes and your ego may convince you that you really should take on those extra bookings.

And so on you go until you realize that you are getting a wee bit fragile and you have forgotten your anniversary again.

So pay attention....

To do it right...

- Feed your own learning. Read books and articles, go to seminars and professional conferences. Take a night course.
- Be a teacher. When you teach this stuff, not only do you build capacity in the work but you challenge and feed your own thinking at the same time.

- Feed your soul. Write, paint, throw pots, design crafts, play music, climb mountains, curl up with your daughter/son or watch birds. Do something that feeds your spirit.

Some pitfalls to avoid...

- Over booking.
- Taking gigs that really are a big mess or just too massive and complex to allow us to do our job well.
- Taking gigs that don't jive with your style or skills. Not everyone has got an eye (and appetite) for detail and is the kind of strong logical/sequential thinker required for strategic planning and operational planning work. (Hurray for those people who have well developed muscles in their left brain!). Not everyone has the flair to pull off a quirky (or unconventional) team building activity. Not everyone is comfortable dealing with conflict situations where emotions run high. Know your strengths.
- Don't be afraid to fail. Nobody gets good evaluations all the time. Accept the criticism and work on improvement. Don't let it get you down.

Some good tools and practices...

- Join or form a learning team or a community of practice based on this work.
- Video yourself. It can be painful to watch ourselves on a TV screen but as they say, it is a great learning experience.
- Build your own personal toolkit. When you learn a technique, a story or a good practice, write it up and keep it in your own book of practice.
- Keep a *learning journal* where you write personal reflections on challenges you face, approaches that were successful, ways to tweak a process you like to make it even better or quotes that inspire you.

Taking care of the organization

Organizational attitudes drift back and forth on this work. They can blow hot or cold. Most people however see the value in having a facilitative culture in the organization. The problem is generally that they forget we are here, they misunderstand our purpose (the old touchy feely mental model), they doubt our abilities (because we are internal consultants) or they think we cost too much. (Hardly...)

So we have a big job to do in nurturing what we call a facilitation culture in our organizations. Too often this gets blown off as politics. Well, it is not. It is called quality of service. It is called marketing. It is called communication. It is called continuous learning.

It is fine to be a good facilitator and to do good sessions. It is better to improve each session. It is even better to advertise and promote the service. It is also a fine thing to create a conversation in the organization about how this work can improve the way we do business. It is so much better to create a learning environment where we all teach and learn new ways of managing knowledge.

To do it right...

- Build your own *personal mastery*. You need to align your personal vision and values to the work. This is a lifetime project.
- You, or your team of practitioners, can develop strategies for communication, marketing and learning.
- Help build organizational and external networks. The more relationships that get formed, the stronger the culture.

Some pitfalls to avoid...

- Sometimes we think we only have to be concerned about the front line. We need to pay attention to managements' need for our work. Never avoid an opportunity to converse, influence or teach.

- Avoid the negativity. In any organization's culture there are always pockets of nay sayers. Do not waste a lot of time and energy trying to convince them. Do good work, they will come around.
- Help your organization avoid the trap of the "prophet in his own country" syndrome. Too often organizations believe that expertise is better found outside the organization and if it is inside it can't be very good. This is a huge *mental model* that organizations must overcome if this work is to survive and thrive.

Some good tools and practices...

- Build a *charter* around the work.
- Get the work onto the management agenda.
- Write articles in the organization newsletter. Start a newsletter.
- Send evaluations and letters of appreciation to management.
- Offer your services more. Suggest an *Open Space* for strategic planning, a *Workout* for a stubborn problem, a *Process Map* for some red tape or a *Team Charter* for a struggling group.

Notes

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Suggested Reading

Facilitation:

Bens, Ingrid. *Facilitating with Ease! A Step by Step Guidebook and Customizable Worksheets on - CD- Rom.* Jossey-Bass, 2000. ISBN : 0-7879-5194-3

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