

the POWER of facilitation

**MAKING IT EASY
FOR GROUPS TO ACHIEVE
AMAZING RESULTS**

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#FacPower

Endorsements

Collaboration, innovation and agility are core, and facilitation is key. Facilitation has the power to ensure all voices are heard, all possibilities are explored, and no opportunity is wasted. This book is an eye-opener for how the power of facilitation can help us work together more effectively to achieve even better results.

Katarina Berg, Spotify, Chief Human Resources Officer & Global Head of Strategy Operations

As a sponsor and facilitator for Imagine Taiwan, I have experienced how the power of facilitation and dialogue provides space and opportunities for people from diverse backgrounds to re-frame the national spirit into a positive, creative, and motivating force of hope. This book is a must read for anyone hoping to bring about sustainable, lasting and positive change around the world.

Jorie Wu, IAF-CPFIM, Director, CP Yen Foundation

In a time of global transformation, success will depend on coming together to innovate and problem-solve. This book will help you bring the best of both worlds to the table.

Bonnie Caver, Chair, International Association of Business Communicators

It is exciting to see many talented facilitators come together and share their wisdom and practical solutions in enabling groups to think and work effectively and enable powerful change. *The Power of Facilitation* truly leverages the experience of the authors and is a must read for anyone in or interested in exploring the power of facilitation.

Vinay Kumar, CPF, Chair IAF and Director C2C Organisational Development

The modern world has a wide variety of significant challenges which can only be tackled if we collaborate, either within organisations or across organisational boundaries. Collaboration does not just happen by itself, there needs to be some stimulus. Facilitation in its various forms can bring diverse people or organisations together to achieve a common purpose. This book provides thoughtful and well-structured insight into the power of facilitation. I would encourage anybody facing big challenges to read it.

Shaun McCarthy OBE, Chair, Action Sustainability

Endorsements

Titansoft was first introduced to facilitation when we embarked on our journey of Agile adoption back in 2014. To create an open and empowering work environment, it is important for us to be able to hear everyone's voice, and facilitation was one of the tools we used to achieve that. We have used it at a team and organisational level; such as during teams' regular sprint retrospectives for continuous improvement, restructuring of development teams, a series of culture workshops to create alignment and shared understanding of company values facilitated by an internal facilitator team, and for company-wide events such as revamping of Titansoft's Vision, Mission and Values during a two-day facilitated workshop involving a group of leaders and representatives from each department. Over the years, we have come to appreciate the benefits of having leaders equipped with facilitation skills - it not only improves the quality of communication with individual employees, but also helps to increase the overall effectiveness of our meetings. Facilitation has come to be not just a by-product of our Agile adoption, but fully integrated into our working approach to build a conducive and safe working environment for our Titaners. This book summarizes in a very good way how we use facilitation as well as gives new inspiration to further organisational development work.

Jasmine Huang, People & Operations Manager, Titansoft Ltd

The right book at the right moment! In our time of multiple crises, *The Power of Facilitation* provides insight into what we desperately need: dialogue, listening, consensus, decision-making, and collaboration. Asking the right questions can help any group, no matter how polarized, move toward a shared vision. I have witnessed the power of facilitation as I have used these methods for decades of UN policy formulation, and in community development, and taught them to grad students at New York University Wagner. Facilitation simply works. It is a critical skill needed in government, civil society, and business, if humanity is to deal with climate chaos, ecocide, racism, fascism, and other challenges. Thank you for this powerful book.

Robertson Work, author of *A Compassionate Civilization*, former UNDP policy adviser, NYU Professor, New York

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This book project is a labour of love for all contributors. Our mission is to promote the power of facilitation worldwide. We are making the book available for free in order to enable and encourage everyone to read it and to share it.

We encourage you to make a voluntary donation to the International Association of Facilitators. Please join us in supporting IAF to promote the power of facilitation worldwide.

For details, and to make a donation, please go to <https://facpower.org/download/>

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About the Contributors

Contributing Authors and Visual Practitioner Biographies

Editor

Kimberly Bain MA CPFJM

Kimberly Bain is Senior Partner at Bain Group Consulting. Kimberly is an IAF Certified™ Professional Facilitator|Master, is former Chair of the International Association of Facilitators, was appointed Visiting Scholar at Queen's University, Adjunct Professor at St. Lawrence College and has been inducted into the International Facilitators Hall of Fame. She is an Amazon best-selling author and has published close to a dozen peer review Journal articles on large-scale consensus building. Kimberly is a leading expert in developing global consensus and assisting in the development and implementation of international standards of practice.

Kimberly has an honours degree in organisational psychology and a master's degree in public administration. In addition, Kimberly is a professional mediator and has successfully completed over 200 court mandated mediations and dozens of workplace interventions around the world.

As an expert facilitator, Kimberly works with groups numbering 5 to 1200, helping them reach consensus. Kimberly has been the recipient of four Facilitation Impact Awards. Kimberly is well known for her work in developing facilitation processes to bring large groups of multinational professionals to consensus. Her latest Platinum award winning project facilitated consensus among over 2000 nurses from 25 countries on medical practice guidelines that have improved the lives of over a million stoma care patients.

Kimberly works regularly in Asia and across Europe, as well as closer to home in North America. She has dedicated her life and career to the power of facilitation and is well known for her passion and dedication to the facilitation community, conducting workshops and seminars in over 20 countries to spread her vision and enthusiasm for the work that we do.

Authors

Malin Morén Durnford CPF|M & Trevor Durnford CPF|M

In 1995, Malin decided to dedicate her career to facilitating real change in organisations, and founded Lorensbergs, a consultancy firm specialising in facilitation. Working together with her husband Trevor Durnford, she has stayed committed to her chosen path and over the past 25 years they have worked with more than 100 organisations across the globe.

Malin works as a facilitator in leadership teams and in large-scale interventions. She is a specialist in designing change processes with facilitation at the core, and has helped many organisations to train and develop internal facilitators. She has been described as “a miracle to work with” by clients around the world.

Malin has a BSc in Behavioural Science from Gothenburg University, Sweden, and a degree in Pedagogy and Adult Learning. She is an IAF Certified™ Professional Facilitator|Master, a IAF Hall of Fame member and an EMCC Certified Coach.

Trevor started his career as a Chartered Mechanical Engineer although soon after realised that his real passion was in the people domain. He became a consultant in the early 90's, training facilitators and leaders in continuous improvement. With consultancy experience under his belt, Trevor went back into organisations, this time in HR. He spent 7 years as HR Director for two UK based multinational companies putting much of his experience in facilitation and change into practice.

Returning back to the field of consulting in 2005, Trevor helped establish Lorensbergs with his wife Malin Morén – building the company up to 25 consultants and working with clients globally in facilitation, leadership development and change.

Recently, Trevor has been Chair of the International Association of Facilitators and recipient of the Gold Award for Facilitation Impact. He is also an IAF Certified™ Professional Facilitator|Master and is on the board of the Solutions Focus in Organisations Association. He now lives with Malin in Uruguay where he continues to work with clients face to face and virtually in between tending to the vineyard and farm animals.

Mark Bain MBA

Mark Bain MBA, is an Adjunct Professor at three institutions teaching undergraduate and graduate students in critical thinking, business analytics, data strategy and business ethics. Mark trains health professionals around the globe on the value of critical thinking skills – the skills needed to challenge “the way we think” and the tools to remap our problem-solving approaches. Mark utilizes his expertise in critical thinking, problem solving and data analytics to help health care professionals challenge the way patient care decisions are made and develop new and innovative models of care.

Mark started his career in corporate finance and then moved into government financial

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policy. After a succession of positions at the director level, Mark decided to leave government to scratch his entrepreneurial itch and started a number of successful business across North America. Mark's long list of experiences include Global Business & New Venture advisor to the Queen's University MBA program; Business advisor to the Turnaround Management Program - European Bank; In council appointment to the Tax Appeal Board and appointment to the Ontario Trillium Foundation Grant Review Board. Mark has received the Ontario Premier's award for leadership and uses his vast experience and knowledge to help others innovate and expand through his consulting work at BainGroup. Mark has authored peer review research articles and continues to explore how organizations can make better use of critical thinking through collaboration to innovate and grow.

Hector Villarreal Lozoya MA

Héctor Villarreal Lozoya works as a consultant, facilitator and trainer supporting teams and leaders to collaborate at a higher level. He believes that true collaboration is the result of a group establishing the right context to succeed. He is a founding partner of Proyectum and Kunlaboro Latinoamérica, a company whose mission is the development of collaboration skills and teamwork solutions applied to project management practices.

In 2014 he started his consulting work with engagements in more than a dozen countries throughout the Americas and the Caribbean. He is a member of the International Association of Facilitators since 2005 and Board Member from 2014-2019. He has a master's degree from Tecnológico de Monterrey and a post-graduate degree from the Complutense University of Madrid. He is a Licensed Trainer of the Effective Facilitator Method, a Certified Facilitator in the Lego Serious Play Method and Stormz Digital Collaboration Technologies. He has a particular interest in the use of new technologies to enrich the processes of team building and collaboration either remotely or in face to face interactions.

Michael Ambjorn CDir SCMP & Martin Gilbraith MA CPF|M

With 20+ years of leading people, Michael Ambjorn has run organisations, chaired boards and developed change makers. As a mentor he provides 1:1 advice to Chairs, Chief Execs and senior leaders - and the next generation of change-makers - on strategy, change and turnarounds. He's particularly interested in how strategic alignment can focus people and enable sustainable growth and renewal. And he is a committed espresso drinker.

Martin Gilbraith works as a facilitator, trainer and consultant to help groups, teams and partnerships work more effectively together to bring about lasting change. What drives him is his passion and commitment to make a positive difference in the world, and to support and enable others to do so as well. He began his career in grass roots community development work in India, Africa and the Middle East, after awakening to his own passion and commitment as an international volunteer. He has been facilitating and training, specialising in ICA's ToP facilitation methodology, since 1986. Since 1997 he has

worked with a wide range of clients in the UK and overseas. Martin is an IAF Certified™ Professional Facilitator|Master, past Chair of the IAF England & Wales chapter and former IAF Chair and IAF Europe Director. He is an ICA Certified ToP Facilitator (CTF) and a licensed provider and experienced lead trainer of ICA:UK Technology of Participation (ToP) facilitation training courses. He is past President of the Institute of Cultural Affairs International (ICAI) and former Chief Executive of ICA:UK, the participation and development charity. He holds a BA in Business Studies from Portsmouth University and an MA in Development Administration and Management from Manchester University's Global Development Institute (then IDPM). His MA research was in civil society, development and democratisation.

Barbara MacKay MSc CPF

Barbara is a full time facilitator, adult educator and mentor-coach to other facilitators since 1995 with her company North Star Facilitators. Prior to founding her current company, Barbara worked for ten years as a socioeconomic consultant and researcher incorporating facilitation skills into environmental and socioeconomic impact assessments of development projects affecting tribes and communities in Canada.

Her experience and knowledge cover 1000's of facilitated and training events delivered to all sectors in the USA, Canada, Asia, Mexico, the Middle-East and Europe. Barbara has an energetic style and clear delivery. She is dedicated to her own and others' continuous professional and personal growth. She currently mentors many colleagues nationally and internationally in facilitation design and competency building.

Barbara is an assessor for facilitation certification with the International Association of Facilitators since 2002 and was inducted into the IAF Hall of Fame in late 2018. Clients have included all levels of government, corporate, non-profit, health, IT, financial and education sectors, tribal groups, large and small business, unions and associations.

She is an avid blogger and is now taking up podcasting to help facilitators and facilitative leaders develop their skills to change the world to be a safer, more just and equitable place. She loves the possibilities of virtual online facilitation and is constantly practising and exploring different platforms to do that. In her spare time, she walks, bikes, camps, cooks, hangs out with her family and friends, and creates mosaics.

Kavi Arasu & Stephen Berkeley

Kavi Arasu is passionate about working with people and helping them help themselves. People development and engineering systemic changes give him joy. His multi-disciplinary background that stretches from sales and advertising to talent management and other domains of HR have helped him experience (and apply) the benefits of applied inter-disciplinary thinking first hand.

Kavi has close to two decades of corporate experience, in multicultural environments

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both in multi-national corporations and Indian organisations. In his last corporate role at Asian Paints (a \$2+ billion coatings multi-national based out of India), Kavi was the group head for Talent Management, Learning, Leadership & Organisational Development, Diversity & Inclusion and Social Collaboration.

Conversations are at the centre of his work, learning and growth and, naturally, facilitation is a very important part of his work.

He tweets (@_kavi) regularly and has been featuring on the 'top 20 HR influencers in India' list announced by SHRM in India since 2012. He has been blogging since 2005 and his website is www.kaviarasu.com. Kavi was the chair of IAF India for 2016.

Stephen is a change and culture facilitator and has focused a good part of his three decade career on helping individuals, teams, organisations and communities in Australia, UK and India to unlock and fulfil their full potential. Stephen has extensive experience working with boards and senior leaders in the areas of strategy development, governance, and business improvement. His speciality is helping people see the bigger picture, connect the dots and develop strategies that bring about sustainable changes.

He is a member of the International Association of Facilitators (IAF) since 2013 and is active in promoting the power of facilitation worldwide. He has been a board member of the IAF India Chapter and is currently a board member of the IAF Australia Chapter.

When he is not helping people have tough conversations, he loves cruising in nature, be it the oceans, rivers, mountains or plains, or experimenting with plant based cooking. Oh, and he loves to start and finish his day with meditation.

Kavi and Stephen have extensive experience in working together across cultures. They are apart in their philosophical moorings, facilitative style, but are united in their values and keenness to serve.

The Visual Practitioner Team

Kailin Huang

Kailin is founder of the visual facilitation practice, Picture People Plan. Interestingly, Kailin possesses no special art training apart from the usual mandatory subject during primary and lower secondary school years. Her brilliant discovery of visual facilitation took place in her former career in organisational development and process facilitation. It was in 2012 that she saw a lady (Wendy Wong of Welenia Studios) draw out beautiful visual notes “live” on flip charts. The words “graphic recording” rang a bell to her but she did not understand it fully until this moment: its potential to bring life to a meeting, and help everyone get a shared picture of what they have contributed during this dialogue.

Kailin adopts a more spontaneous style of visual presentation, ebbing and flowing according to the dynamics of each conversation and meeting. She believes that her utmost strength as a visual practitioner is being able to honour each conversation in its unique way as opposed to imposing her favourite style on them. In 2018, Kailin wrote and published Asia’s first visual strategy playbook, “Let’s Draw, Draw Out, and Draw Together!”

Rosanna von Sacken MSc CPF

Rosanna is the founder, principal consultant of Advanced Consulting and Facilitation Ltd., based in metro Vancouver, British Columbia, Canada, since 2001. Her primary work involves designing and facilitating workshops, meetings and training programs, helping organizations, groups and executives in team and leadership development, strategic planning, multi-stakeholder and community engagement, and courageous conversations. She coaches individuals and small leadership teams to help them see and connect to possibilities, learn and grow at the edges.

As a visual facilitator, coach and communicator, she uses her creativity, lettering and drawing skills to complement her passion in all things visual. She was a contributing co-author in the book *The World of Visual Facilitation* (2019), and she is the illustrator for Rebecca Suthern’s book titled *Sightline - Strategic Plans that gather Momentum, not Dust* (published in 2020). Rosanna also creates explainer videos, provides graphic recording in studio and in real time, and trains facilitators in using drawings and visual tools. Although no longer her primary work, with her applied geology degree and roots, Rosanna has been providing and continues to provide emergency management consulting in her business.

Debbie Roberts

Debbie is a graphic facilitator, recorder, and trainer, based in the UK, who works with organisations large and small. Her early career was in mental health and wellbeing and focused on empowerment, community action and leadership. During this time she became skilled at leading projects, hosting and facilitating conversations. She learned about graphic facilitation and meaningful doodling and over time threaded it into her

facilitation through the mapping of conversations and processes with groups.

Working as a dedicated graphic facilitator, a visual practitioner, in 2009 she founded Engage Visually. Clients include, Kings College London, Cambridge University, Cambridge Neuroscience, IIEP UNESCO, NHS England and many NHS Trusts and Universities. Debbie's work is driven by a belief for social and environmental justice and wellbeing and empowerment for all individuals and communities.

Chitra Chandrashekhar

Chitra Chandrashekhar, is the founder-proprietor of Mographies (since 2011), a creative visual story design studio cum story consulting micro-practice. Through Mographies, she facilitates authentic conversation loops, conscious co-learning sessions, and co-creative community connections, with diverse graphical/visual story solutions, that have served fortune 500 MNC's, consultancies, private firms, non-profits, government institutions to micro businesses.

Chitra has been a visiting faculty member with private and government, design, architecture and management schools/ universities in National Capital Region, India. She has presented academic writings in international arts, education and design conferences, performed stories and facilitated creative workshops in storytelling festivals and mini-maker fairs, in India. She has also routinely contributed skills, knowledge and information in various online and offline communities of practice for design education, storytelling and graphic facilitation.

Chitra is an architect and visual communication designer by qualification, and an alumna of the School of Planning and Architecture, New Delhi and IDC School of Design, IIT Bombay. Her interest is in cross/inter/trans-disciplinary projects that enrich the human experience. Through her practice, she endeavours to see the world as interwoven micro stories and macro myths, bridging information gaps between theory and practice of sustainable design, in multiple facets of life.



Introduction

What is the Power of Facilitation, and Why is it Important?

From the beginning of human history, questions about how we organize ourselves, create and innovate, strategize, make decisions and resolve disputes have been considered by philosophers, academics and thought leaders. From Plato's writings on a just society to Aristotle's methods of inquiry; from Chester Bernard's Functions of an Executive to Peter Senge's theories on leadership, the foundational belief is that humans have the capacity to interact and think together. And when we do, we can achieve amazing results. The power of facilitation is exactly that. Creating the space, the time and the conditions for people to think together, create together, solve problems together and design a brighter future together. The emphasis is always on "together".

"Never doubt that a small group of committed people can change the world. Indeed, it is the only thing that ever has"

Margaret Mead

"Once a society loses this capacity [for dialogue] all that is left is a cacophony of voices battling it out to see who wins and who loses. There is no capacity to go deeper, to find a deeper meaning that transcends individual views and self-interest. It seems reasonable to ask whether many of our deeper problems in governing ourselves today, the so-called 'gridlock' and loss of mutual respect and caring... might not stem from this lost capacity to talk to one another, to think together as part of a large community."

Peter Senge

There are many examples in history of how misinterpretation, miscommunication and misunderstandings have led to catastrophic results. Wars, takeovers, failures, etc., prove what can go wrong when we do not think together effectively. But what about all of missed opportunities to achieve amazing results. What about the cure that never became mainstream medicine, the invention that never saw the light of day, the youth centre that never got built or the process improvement that was never seen by senior management? We should not just learn from the colossal mistakes. We must also consider the 'what ifs', those lost opportunities that we don't yet know about.

This book is designed to explore how the power of facilitation can help us think togeth-

er more effectively for better results. It provides examples of how the power of facilitation can help avoid the ‘misses’—misinterpretations, miscommunication and misunderstanding. Facilitation has the power to ensure all voices are heard, all possibilities are explored, and no opportunities are wasted.

So, what is facilitation anyway?

One question we are often asked is, “What is Facilitation? Is it a philosophy, a skill, a process or a profession?” The short answer is “Yes, it is all of these.”

Facilitation is a Philosophy. It is the fundamental belief in the innate ability of people to collaborate. It is the philosophical underpinning of all civilized societies and most political movements. It is the belief in the wisdom and abilities of people. It is also the belief that not only are two heads better than one, but that when groups of people share ideas $1+1+1 \neq 3$. It is the understanding that when three people share their ideas, they build on each other’s concepts, expand their own and each other’s thinking and create new ideas. It is the deep-seated conviction that $1+1+1 = \text{infinity}$.

“Meaning is all we want. Choices are all we make. Relationships are all we have.”

Sandy Schuman

Facilitation is a Skill. While everyone has the ability to enter into authentic and intentional conversations, we don’t always do it. In fact, the examples of the power of facilitation provided in this book are unfortunately the exception rather than the rule. Facilitative skills are a prerequisite for leaders, communicators, educators and politicians. Facilitative skills are, however, often overlooked, passed over, ignored or forgotten in our race for efficiency, perfection, innovation and indoctrination. Facilitative skills are often seen as simple techniques that don’t actually need training or practice, techniques that are an obvious extension of a leader or manager’s positional ability. That fact, we argue, could not be further from the truth. As with any skill, facilitation needs to be understood, learnt and practised.

Facilitation is a Process. In order to help people exercise their innate facilitative abilities, specific processes have been created, and continue to be created, to support people

We often over-estimate the importance of the leader and downplay the importance of leadership.

to think together. These processes have been developed using concepts from the behavioural sciences and anthropology. The processes are based on an understanding of the creative process, of group dynamics and of the generative power of original questions. Often these processes are simple and easy to apply, once their phenomenological basis is understood. Other times they have very subtle requirements that, if not managed expertly, can hinder

more than they help. Some of these processes are described in this book. Some take years of study and practice to perfect. But as the body of knowledge in facilitation expands, we hope that the understanding and appropriate use of these processes will also expand.

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Facilitation is a Profession. Individuals who hold the philosophy of facilitation, sometimes like a religion, have created the profession with the requisite body of knowledge, code of ethics, competencies and professional certifications, with an international body to hold it all together. This body is the International Association of Facilitators (IAF). Its members dedicate themselves to the art and science of facilitation and see it exactly like that—an art AND a science. Professional facilitators are specialists in harnessing the power of facilitation to help individuals, groups, organizations and societies engage in intentional conversations, solve unsolvable problems, resolve deep-seated conflicts, innovate, improve and thrive.

The Power of Facilitation frees people to speak and explore their views and ideas. It allows results to emerge rather than be orchestrated.

While facilitation is still a rather amorphous concept, harnessing its power is not rocket science. Facilitation brings people together and gives them the time and space to interact with themselves and others. It empowers the magic

“Organizations are no longer static, hierarchical structures that need managing and controlling, but rather are dynamic, fluid networks of interconnected players that must be engaged by mission and opportunity.”

**Ming Zeng
in Smart Business**

of collaborative human ingenuity. In our experience, facilitation has the power to profoundly transform individuals, groups and teams, organizations and communities, and even whole societies. Even for those of us who already fanatically believe in the power of facilitation, we are continuously amazed at its ability to create positive, powerful and lasting change.

This book seeks to illustrate the power of facilitation by sharing stories and examples of how facilitation has made a lasting impact in achieving a variety of goals, and in a variety of contexts around the world.

What’s in this book?

This book was a collaborative effort of global thought leaders in facilitation. Each chapter looks at the power of facilitation in the different aspects of business, community, life and society. It gives examples of how it helps people think together to achieve amazing and impactful results. It also gives examples of how to use its power to think better on your own.

“What gets co-constructed... will be valued and valuable to the human system for one overarching reason: the quality of the ‘relational space’ from which the new constructions of the future are nurtured makes a difference that makes the difference.”

David L Cooperrider

The chapters are organized starting with how the power of facilitation can help to create positive, sustainable change in organizations, help organizations think strategically and critically and help resolve conflicts. The final few chapters look at how the power of facilitation can do more than solve specific problems or achieve specific goals; they reflect on how facilitation can be used to help individuals, teams and society as a whole to

think together, grow and innovate.

The first chapter focuses on the power of facilitation in strategy development and implementation. There are hundreds of books about strategic planning with copious tools and templates explaining how to determine your envisioned future and strategic priorities.

“Working with groups can be difficult in innumerable ways, but working without groups is nearly impossible.”

Sandor Schuman & John Rohrbaugh

What those books don't tell you is how to authentically and practically engage key people in a way that results in better outcomes and more transformational impacts. This chapter focuses on a collaborative push-and-pull process, based on the abundance mind-set, with a clear bias towards action and innovation. The power of facilitation can help ensure your Strategic

Plan or goals are backed and implemented by cheerleaders both inside and outside your organization.

The second chapter explores the power of facilitation in successful change and organisational transformation initiatives. The authors take us through three success stories that demonstrate that change comes about one conversation at a time and organizations become world class one person at a time. They also examine the benefits of an abundance mind-set in growing facilitation skills across organizations. They show how expanding people's understanding of the power of facilitation helps the entire organization transform through sustainable and positive change. Creating deep and lasting change requires commitment from all levels and corners of the organization. This chapter shows how the power of facilitation can make that happen.

“The thing I hate about an argument is that it always interrupts a discussion”

G.K. Chesterton

The third chapter looks at the power of facilitation and critical thinking, and examines how questioning assumptions and reasoning through logic and diversity of thought can help individuals, groups, organizations and communities reach more sustainable conclusions. The author reminds us that successful companies begin and end with the people

inside and outside the organization. He examines how critical thinking, in concert with communication, collaboration and creativity/innovation, can amplify the power of facilitation.

“The discipline of team learning starts with ‘dialogue’, the capacity of members of a team to suspend assumptions and enter into a genuine ‘thinking together’. To the Greeks, ‘dialogos’ meant a free-flowing of meaning through a group, allowing the group to discover insights not attainable individually...[it] also involves learning how to recognize the patterns of interaction in teams that undermine learning.”

Peter Senge

The fourth chapter explores the power of facilitation in resolving conflicts. Using Mary Parker Follett's famous quote, “All polishing is done by friction,” this chapter shows how the power of facilitation ensures the friction polishes rather than destroys human relationships. Examples from the field, including large-scale societal conflicts, show how facilitation can be an enabler of positive public dialogues and crucial conversations. Facilitation enables individuals, groups and

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societal factions embrace the notion of constructive conflict—moving from ‘beat and defeat’ to ‘together we can.’

The fifth chapter examines the power of facilitation in growing high performance teams. The author explores how process facilitation can help a disparate group of individuals, together for a short period of time, fruitfully collaborate like a high-performance team. The chapter looks at how facilitative processes can impact the development and interaction of the group, how it accelerates performance and how it can help groups evolve into teams.

The sixth chapter examines the interface between facilitation and communication and how the power of facilitation can help spread the message and help expand understanding, for both the originator(s) and the receiver(s) of the message. The authors examine what it takes to align people behind change, the importance of context and how a big picture can help avoid analysis paralysis.

The seventh chapter is about the power of facilitation in promoting personal and professional growth. Many people mistakenly think that facilitative thinking is only something you help others do. This chapter explores the use of self-facilitation for personal reflection and for charting your own journey and it aims to strengthen your understanding of the power of facilitation in creating big, meaningful lives. Three different creative personal planning processes are discussed in detail with examples with which to experiment.

The eighth chapter wraps up our exploration of the power of facilitation by examining the benefits of living a facilitative lifestyle. The authors make a case for facilitation and a case for you. They purport that as humans perpetually evolve, we will need to make sense of what emerges. We will need to keep coming together to make collective meaning of new realities and from that, prioritise our actions. This thought-provoking chapter brings us back to first principles and reminds us of the potential the power of facilitation can have in our lives.

The Appendices at the end of the book are meant as references for readers. Appendix A provides descriptions of the facilitation processes discussed in the chapters in the order in which they appear. Appendix B provides recommendations for further reading, important references and suggested blogs and websites that the authors recommend for those who want to learn more about process facilitation and collaborative processes.

“It is strange that for every new piece of technology, we get a manual on how to use it. Except for humans. We come into this world to face the puzzles of existence without any manual called, How to Be a human Being.”

R. Brian Stanfield

Why now?

A global pandemic, economic upheaval, leadership changes and system level changes that rival those not seen since the First and Second World Wars. But whether we think back on this as a time of growth, chaos or disruption, it is what we do next that will define the outcomes.

Today, maybe more than any point in our history, facilitation—the philosophy, the skill, the process and even the profession—is critical to our continued evolution as individuals, as groups, as organizations and as societies. To survive and thrive, we need to harness the power of facilitation to help us hold the authentic and intentional conversations that will help us understand ourselves, each other and the world around us. Thinking together is the only way we will be able to grow through the chaos and disruption and end up in a better place.

Our collective purpose of writing this book was to inspire you, the reader, to discover and unleash the power of facilitation in yourself and in others. All solutions start with a conversation. This book is intended to help you begin your own very interesting conversations and our hope is that this book will act as the catalyst to help you do that. We also hope that you will be inspired to weave facilitation and facilitative principles throughout your life, your interactions, your thinking, your decision-making and your actions. But most of all we hope that you will take the ideas, examples and concepts described in the following chapters and apply them in your groups, organizations and communities.

Happy reading!

Kimberly Bain



Chapter 1

The Power of Facilitation and Strategy

Kimberly Bain

If you Google “Strategic Planning”, you will find thousands of books, articles and resources on the subject. From Porter’s Five Forces to Schumpeter’s Gales of Destruction, from Blue Ocean Strategies to Edge Strategies and from agile organizations to continuous learning organizations, there are hundreds of tools and templates, thousands of how-to-guides and mountains of advice on how to create and execute the perfect Strategic Plan. But strategic planning is not about the plan. It is about the impact of strategically thinking together. It is about intentionally evolving and growing in a way that is purposeful and directional. It involves thinking critically and collaborating inside and outside the organization. Because it is not just about what the organization does, it is about how the organization thinks.

K.E. Weick, in his book *Sensemaking in Organisations*, tells a story about a group of soldiers lost in the Alps after a snowstorm. They began to lose hope but then one person in the group found a piece of an old map in his coat.

“In preparing for battle, I have always found that plans are useless, but planning is indispensable.”

General Dwight D. Eisenhower

They rallied, studying the map and coming up with ideas on how to make it to safety. They eventually made their way to shelter and were rescued, only to find out later that the map was of the Pyrenees Mountains. Like the piece of old map, the purpose of a strategy is not to lead you down a path. Rather, its intention is to unite people in a common purpose, ignite their spirit and belief in the possible, provide focus/direction and build momentum.

When clients ask me to facilitate their Strategic Planning, I always start by explaining my three golden rules:

1. Positioning and competitive advantage are too static. A Strategic Plan should be a living document that continuously evolves.
2. There is no place for scarcity thinking in Strategic Planning. What is required is an abundance mentality and a solution-focused approach.

3. In order to foster an abundance mentality and maintain a living, breathing strategic plan, we must focus on the process. We need to not only change what the organization does; we need to change how the organization thinks.

The power of facilitation is that it enables and supports each of these golden rules. It provides the foundation and energy for organizations and communities to see past the boundaries of what is. It allows them to move to the land of what could be. And it helps them think together to create the means to get there. The following explores each of these golden rules in detail.

Golden Rule #1: Strategy is a living resource

“We live in a time of such dynamic change that there is never one future ahead of us but one unfolding every day.”

Lawrence Philbrook

The future is not some point in time. The future is a continuum that begins now and has no defined ending. There are many possible futures; today does not need to be a limiting baseline.

Data-driven Strategic Planning often starts with analyses like the SWOT and the PESTLE,ⁱ are grounded in Porter’s Five Forcesⁱⁱ and focus on removing obstacles. This binds our thinking in current and past realities. Being opportunistic is responsive, being innovative is proactive. The power that facilitation brings to strategic thinking is that it opens the conversation to what is possible—beyond what is, to what could be. It fosters an awareness across the organization that opportunity resides in ambiguity.

Elizabeth Gilbert, in her book *Big Magic*, declares that we have moved from the knowledge revolution to the creativity and innovation revolution.ⁱⁱⁱ

“The drive for perfectionism is a corrosive waste of time”

E. Gilbert

She goes on to say that “the drive for perfectionism is a corrosive waste of time.” Success stories like Alibaba support her claim. In his book *Smart Business*, Ming Zeng writes, “Strategy no longer means analysis and planning, but rather a process of real-time experimentation and customer engagement.”^{iv}

He goes on to explain that “the familiar forces of competition are falling away and giving rise to new forms of cooperation between business and myriad other players. When strategy is no longer predicated on competition but centred on coordination, the ways of creating value are completely transformed”. Zeng recognized that being opportunistic is responsive, but being innovative is proactive.

Those in the Agile Movement^v understand this to mean there are many ways to achieve a goal. The Agile Manifesto says it is best to choose a course of action, based on today’s

“Being opportunistic is responsive, being innovative is proactive.”

thinking and information. You then need to continuously improve execution based on the information you gain as you move forward. This “good enough for now” mentality requires agility of thinking. It also requires

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agility of structure and processes to enable the organization to iterate into its best future. The organization must understand how to think and act in an agile manner. It must analyse its culture and structures to ensure there are no corporate antibodies that kill risk-taking, creativity and innovation.

Facilitating strategic thinking in a way that makes this possible across the organization is critical. We need to bring together people from both inside and outside the organization. We need to include those who serve and those who are served. And we need to provide the tools and processes for everyone to think together effectively. This is what facilitative Strategic Planning does. It helps organizations think better together.


Golden Rule #2: Abundance meets focus

The mind-set of competitive advantage, differentiating between quality and cost, working harder, doing more and brand distinction are all grounded in what is, rather than what could be. The abundance mindset utilizes pull logic, not just push logic, and focuses on discovery-driven thinking. Facilitating strategic thinking that relaxes assumptions and releases creativity allows for consideration of the possible. This can be profound and transformative.

“Approaching every strategic planning conversation with a solution focus allows us to balance the need for radical openness to the possible with a grounding in reality.”

Facilitators do this by asking original questions about what the organization does and what its customers want. This allows conversations to move from problem-solving to innovation, from being based in past experiences to being future-focused. It can be the difference between creating a strategy that is the cornerstone of the organization rather than the capstone of the organization.

Solution-focused thinking is not just about identifying what works and doing more of it. It is about identifying what works and leveraging it to improve everything. Approaching every Strategic Planning conversation with a solution focus allows us to balance the need for radical openness to the possible with a solid grounding in reality. Strategic Planning is about agreeing on a common purpose and goal and moving forward together to achieve them. It is about creating and maintaining a can-do attitude and supporting a bias towards action.

<i>Radical openness to the possible</i>		<i>Grounded in reality</i>
<i>Bias towards action</i>	Balanced with	<i>Strong, clear, lived strategic values</i>
<i>Innovation-enabling structures</i>	Balanced with	<i>Processes that support creative innovation</i>
<i>Real-time experimentation / iteration</i>	Balanced with	<i>Solid Mission</i>
<i>Abundance mentality</i>	Balanced with	<i>Solution-Focused</i>
<i>Organisational agility</i>	Balanced with	<i>Vision embedded into the DNA of the organization</i>
<i>Push-pull collaboration</i>	Balanced with	<i>Strategically intentional measurement systems (real-time data)</i>
<i>Needs explorers & connectors</i>	Balanced with	<i>Needs planners & producers</i>

Golden Rule #3: Change what we do, change how we think

Many wisdom traditions say it is not about the destination, it is the journey that matters. This is especially true in Strategic Planning. We have all heard of, or experienced, situations where companies hire consultants to develop a Strategic Plan for them. Research is done, interviews are conducted, meetings are held. This all results in a beautiful glossy plan that includes the latest management theories and industry best practices. Money changes hands, announcements are made, often with much fanfare, and copies of the plan are distributed to managers, staff and shareholders. The plan sits on people’s desks for a few weeks. Then it migrates to the bookshelf. Soon it is forgotten in the myopia of core business perfectionism and the hustle of day-to-day realities.

Sadly, this version of Strategic Planning, or a similar-type process, still happens in organizations today. It doesn’t matter if it is a consultancy, a senior management work group or a board retreat. When a small group of people develop a plan for the organization, they are telling “the rest” what path to take. This is destination-focused and not journey-focused. If there are multiple futures available to us, choosing just one future is limiting. Especially since choosing that one future is usually based on current realities and static archival data.^{vivii}

Focusing on the why, helps get past the but.

For true strategic thinking to happen in organizations, the focus needs to be on how the Strategic Plan is developed, not on the plan itself. What process, or processes, will be used to tap into the collective wisdom of the organization? How should we access the system in which the organization lives? Who needs to be part of the conversation?

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When do they need to be engaged? How should the collaboration be facilitated? These are critical questions that must be thoughtfully examined and considered.

The goal is to design a process where the Strategic Plan becomes organically embedded in the organization at the cellular level. Because, at the end of the Strategic Planning process, rather than reading the plan, you want staff to be part of the plan. Rather than hearing the plan, you want them to understand the plan. And, most importantly, rather than receiving the plan, you want them to be cheering the plan.

Excuses, Excuses

After explaining my three golden rules to clients I usually get some version of the statement, *“That all sounds great but...*

- *we want to have the new plan in place in three months, so we don't have time to do all that engagement stuff;”*
- *we don't want to get caught up in a long navel-gazing exercise;”*
- *our workforce is much too busy to be involved at that level;”*
- *people are far too cynical to be interested in Strategic Planning;”*
- *our staff and customers don't understand the complexities to make informed recommendations;”*
- *we already know where we want to go over the next few years, we just want to confirm that and solidify the road map;”*

Do any of these sound familiar? Trust me, I have heard all of them and more. It all comes back to the original question: why are you using organisational energy and resources to do Strategic Planning? What is your expected return on investment? When I ask the clients the why, it helps us get past the but.

The chart below shows some real-life examples of conversations I have had with clients around the why. It usually takes a few layers of why questions to get to the root of the problem or issue they are trying to address. It provides some actual client root problems/issues. It explains what they were really trying to achieve through their Strategic Planning process. It also describes my response regarding how using a facilitative Strategic Planning process can help them achieve their goals.

Here are some of the reasons clients have given when I asked them why they are doing Strategic Planning and my responses.

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<i>Client rationale for Strategic Planning</i>	<i>My response</i>
<i>The industry is changing and if we don't also change, we will go the way of the dinosaurs.</i>	<i>If every time you need to change, you go through a planning exercise, you will always be reacting. In order to survive, you need to continuously evolve. Remember not all the dinosaurs died, some evolved. In order to continuously improve you need to help the whole organization think together. This Strategic Planning process is not just about creating a plan. It is about helping the organization learn how to continuously evolve.</i>
<i>Donations are down, we need to inspire donors and funders to support our organization and our programmes.</i>	<i>Inspired organizations inspire donors. To become inspired the organization needs to think inspirationally. You need to believe in the possible and act on those beliefs. "Together we can" needs to be your new mantra. Everyone needs to incorporate that attitude into everything they do. Facilitative Strategic Planning is about inspiring everyone inside and outside the organization.</i>
<i>Revenues are dropping and costs are rising, we need to turn things around.</i>	<i>The days of doing more with less are past. Facilitative Strategic Planning is about harnessing the collective wisdom of everyone. It is about examining what works and how to leverage those successes to elevate the whole organization. The process will also allow you to critically examine current structures and internal processes. It will allow you to see what might be hindering risk-taking, innovation and improvements.</i>

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<p><i>Staff satisfaction surveys are at the lowest we have ever seen, turnover is high and recruitment is becoming more challenging.</i></p>	<p><i>Engagement is a key indicator of success for most organizations. Facilitative Strategic Planning holds engagement at its core. It focuses on engaging staff, customers and stakeholders. It enables them to understand and contribute their ideas and inspirations. It allows them to see how their contributions influence the whole. Recognizing the value you bring to the organization, and knowing the organization values you in return, is important for all staff. Facilitative Strategic Planning enables this change in culture and values.</i></p>
<p><i>We have been working based on an outdated plan for a while now and our Board feels directionless.</i></p>	<p><i>Focus and shared goals are mission-critical in today's climate. If your goals are not truly shared by everyone, you risk creating a strategic path rather than a strategic plan. Facilitative Strategic Planning ensures everyone is committed to the shared goals. It ensures everyone understands their role in achieving the goals. And finally, it creates the momentum needed for success.</i></p>

Three examples from the field

Three real-life examples¹ are offered below. Each of the examples began with a client asking me to help them develop or renew their strategy. Each had unique aspects that needed to be considered and built into the process. Although each client had vastly different needs and goals, they all followed the three golden rules. The first example is a large multinational healthcare corporation. The second is a rural not-for-profit community service agency. The third is a pan-national advocacy organization. In each case, a process was designed to create the most impact for that organization. The resulting plans became the rallying cry that united and focused the organizations and stakeholders to achieve great things.

Example #1: Changing Clinical Approaches in Healthcare

A team from a multinational healthcare corporation contacted me. They asked for my help to develop a strategy to change the way clinicians dealt with a specific subset of patients. I met with the team and asked them a series of questions about why they wanted clinicians to change. After a series of why questions, we finally got to the root issue. They realized the impact they wanted to achieve was not actually a change in clinical practices; that was simply a means to an end. What they really wanted to do was increase the quality of life of patients. With that goal in mind, we got down to the work of developing a process. Our focus was to engage clinicians, patients, academics, marketers and administrators in the

dialogue. We needed them involved to make this change happen.

The process involved people from 30 countries. All of them had an impact on the patient journey. We also included patients themselves. The engagement incorporated online surveys, virtual and face-to-face conversations. Research and analysis were shared. Ideas were raised, considered, adapted and prioritised. Everything was documented along the way in easily consumable pieces, then shared extensively. The final product was not only a clear strategy, but also an implementation plan that included commitments from within and outside the organization.

All measurements of success were achieved. The team reported that implementation was faster and smoother than for any other strategy they had developed in the past two decades. They were happy with both the process and the outcome. The client lead said that everyone inside and outside the organization supported the plan because they had all had a hand in its development. She went on to explain that the most important indicator of success was the ease and speed of implementation and adoption across the 30 countries. Because people were already on board, they were able to skip the usual sales and education stage. When the plan was finished, and head office distributed the materials, people's responses were, 'Thanks but we are already way ahead of you and have started implementation.'

The company later reported that past strategies had taken a decade or more to reach implementation levels, which significantly impacted patient care. For this project, they saw results in less than 12 months. That is the power of facilitative Strategic Planning!

Example #2: Creating a Community of Cheerleaders

An Executive Director for a large rural not-for-profit social service agency approached me. She had been in the job for two years. Yet she still found it hard to know what direction to take the organization. The Board had a Strategic Plan developed by an outside consultant seven years ago. However, not many of the goals in the plan had been achieved. This made the Board reluctant to spend money on Strategic Planning again. They also did not want to divert funds from client services.

The Executive Director asked me to present my ideas to the Board. After a quick Google search, it was clear that this organization did a lot of great work. If it closed its doors, the quality of life of the residents across its 5,000+ sq km catchment area would decrease significantly. The agency provided high-chair-to-wheelchair social services. Its services were well utilized. However, it relied exclusively on grants, donations and volunteer support to survive.

At the beginning of the Board meeting, I asked each Board member to introduce themselves. As part of the introduction, I asked them to tell an inspirational story about the services the agency provides. Each Board member became animated as they talked about how the agency had positively touched lives within the community. After the introductions were over, I asked them to think about how they felt now compared to how they felt when they walked into the room. They agreed they felt more positive, inspired

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and energized. They immediately saw the benefit of engaging staff, volunteers, funders, donor and the community in a similar exercise. Together, we created a Strategic Planning process with the main goal of ensuring that everyone involved felt like the Board did at that moment—inspired, positive and energized.

Storytelling was used throughout the engagement process. Stories of community, of resiliency, of inspiration and hope were shared and documented. Volunteers talked about the value they received from their interactions with clients. Families talked about the support and assistance they had received and the difference it made in their lives. At each session, participants talked with enthusiasm about how to do more to expand community well-being. People brainstormed about what to do and how to do it. Our process encouraged everyone to use “I will”, “we can” and “they should” statements, ensuring that discussions did not revert to “someone should” but focused on “we will”.

The result was an inspirational plan with an entire community of enthusiastic “doers” lined up to make things happen. The organization is now thriving with new volunteers. They have an expanded donor pool. And they have experienced a growth in programs and services. This is also the power of facilitative Strategic Planning.

Example #3: Rethinking the Future

I was recently approached by a national conglomerate of advocacy agencies. They had combined forces to amplify their collective voice, with the hope of putting their issues on the national agenda. Yet, they were frustrated with their lack of impact and were wondering if it was worth the effort of keeping the organization together. They wanted to engage in a strategic discussion about their future. There were several layers of questions that needed to be answered before the organization could determine if they had a future together. Only then could they consider what that future could look like.

The depth of the existential issues involved had paralysed the organisational leadership. To get them unstuck and facilitate the types of authentic conversations needed to move them to a decision, we created a process that brought in more voices. The facilitated sessions were designed to help participants critically think about the needs and wishes of their home organisations. We then balanced that with the collective needs of all the organisations. After a series of difficult but enlightening sessions, the group decided to keep its mandate. They also decided to change their structure and the way they worked together.

A renewed sense of optimism and focus breathed life into the group. It also recalibrated their commitment and expectations. The Board was pleased with the results and is looking forward to seeing the impact of its collective advocacy across the country. Uniting an organisation's sense of purpose and focus is also the power of facilitation.

Conclusion

The examples and ideas in this chapter focus on the process of Strategic Planning. And that

process really is all about the journey, not the destination. Facilitative Strategic Planning is all about the process of developing the plan, rather than the plan itself. In the examples described in this chapter, the actual writing of the Strategic Plan was merely a formality,



Visual summary by Kailin Huang

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Creating a living, breathing strategic plan, allows organizations to continuously evolve and grow. Using a solution-focused approach, and abundance mentality, creates a sense of optimism and engagement. Excitement about future possibilities is created both inside and outside the organization.

A facilitative Strategic Planning process doesn't just change what the organization does. It changes how the organization thinks. The power of facilitation enables this by creating the space, time and structures for authentic, open and creative conversations.

As Jack Ma is often quoted saying, "Hold on to your idealism and ambitions and don't get complacent ... today is hard, tomorrow [may] be worse, but the day after tomorrow will be beautiful."

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Chapter 2

Facilitating Change and Transformation

Trevor Durnford & Malin Morén Durnford

In this chapter, we share our experience of how to create and develop facilitative competencies and skills. Enabling internal people to facilitate change and transformation, with external facilitators as support. With this 'train-the-facilitator' approach, the organization builds its own facilitator competencies. Also, the role of a facilitator becomes well known in the organization and becomes utilised much more. Managers become better internal clients through greater awareness of the power of facilitation. They become better facilitative leaders themselves.

If you are involved in leading change that engages everyone in the organisation, then you will find out in this chapter how facilitation can help. If you're an internal facilitator helping your organization with a change process, there will be tips and insights for you too.

As facilitators, with over 25 years of organisational change and transformation experience, we want to share our reflections and learnings with you. We will do this by describing how we have facilitated successful change and transformation in three different organizations, using facilitators and leaders internal to the organizations and discussing why we think that led to sustained and positive outcomes.

We are sharing three different real life examples of how internal facilitators and leaders could bring about change and transformation in their respective organisations. The first example comes from the manufacturing industry. Here the organization adopted Lean Manufacturing. Internal facilitators made it easy for Lean methods and tools to make a difference in factories worldwide.

The second example comes from an insurance company, where digitalization prompted new ways of working. This required new views on leadership and 'co-workship', capability to collaborate with one another. The aim of this project was to shift to a transformed culture. Here, facilitative leadership played an important role in modelling the way and making it happen.

The third example comes from the public sector. We share how internal facilitators enabled a merger between two hospitals. This has a special focus on how internal facilitators used solution-focused methods to bring out the best in two clinics to build one new one.

At the end, we will share some more reflections around how to train and develop internal facilitators—some do's and don'ts, and our tips for success. We kindly ask the reader to keep in mind that this is 'our good practice', rather than saying that this is 'the best practice'. Yet, using this approach has made our facilitation practice one of the biggest players in the market.

When it comes to facilitating change, there will be some good “take-aways” in the readings ahead. We have made the three examples anonymous due to confidentiality agreements. Yet, everything you read contains authentic examples from real life. One thing that you will find in common across all examples is that it starts with a cry for help from a client.

Example #1: Business Excellence in a Global Manufacturing Industry

“We are going through massive change,” the CEO said. “Everything will change! Everything!”

We looked at the man sitting opposite the massive desk at the headquarters office in Gothenburg, Sweden. He looked excited, almost upbeat, and still a bit anxious. His colleagues from the leadership team, present in the room, looked a little bit more anxious than upbeat.

“Mr. Johnson,” said Trevor, “say some more about the needs you see. And why you have invited us to this meeting.”

“I only have one issue with this change, well, this transformation. How is it going to happen? To draw on paper what to change, squares and lines and even dotted lines, that is easy. But to make it happen in real life, during a short period of time and leaving a positive memory in the organization, that is tricky. I need people who can help to make this easy! Or at least easier! That's why you are here! We've embarked on so many initiatives: TQM, Continuous Improvement, 6-Sigma, you name it. They have all come and gone and left a little mark but have not sustained. This time, it needs to be different.”

Mr. Johnson was spot-on. The tricky thing is that usually, the question is never one of 'What to change?'. Instead, it is 'How to make it happen?' How to sustain it in a way that leaves positive memories in the organization, making the next transformation even easier. Leaving a positive legacy for future generations of change is key.

What he was aiming for was a transformation. To shift 130 factories worldwide to adopt one single manufacturing approach based on Lean principles. This was not the first time the organization tried to change their ways of working to ensure there were more effective work processes. Several attempts at similar change, including 6 Sigma, Kaizen, TQM, etc, were all more or less successful but not sustained.

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This was the first time the organization decided to embark on a change of this nature with internal resources—facilitators who would train other facilitators to enable change. A systematic, self-organised approach that turned out to be a successful way of working in a vast, rather sceptical organization. With a team of around 100 internal facilitators from all around the world, trained to support this transformation.

We based the work on a few, but important, principles:

Find what works and do more of it...

We noticed, early on, that what seemed to work in this organization was the natural spread of ideas, much like a virus spreads through the body, or how memes on the Internet go viral. The question was: how can we make this a great idea? Something that creates curiosity in the minds of the global site managers rather than a big ‘tsunami’ roll-out approach, which was the norm for many attempts before? An opportunity came along at a large conference held in Asia with all managers. Rather than announce this as a roll-out, this time it was as an experiment. Furthermore, it was only possible for a handful of sites to join in. They would all get supported with facilitators. This idea of scarcity, or limiting the extent of the programme, seemed to result in a desire to be a part of the first wave... always a good start.

Think self-organising change!

Two great thinkers in the field of emergent change have influenced much of our work, Ralph Stacey and Ed Olson, authors of *Facilitating Organisational Change*^{iv}. One of the principles of Ed Olson’s work is that it is possible to influence the change landscape from control to self-organising to chaos.

We needed to find a way to make sure we didn’t descend into chaos where everyone took a different approach. And neither create something that wouldn’t flourish. In natural systems if there is too much control, the living organism tends to struggle. Yet in the ‘self-organising’ space, according to complexity thinkers, this is where novelty, innovation and vibrant change can occur. So, it’s important not to control the way in which change happens either, even though we all tend to have a desire for agreement and certainty.

Making it too big would result in us having a chaotic change on our hands.

The answer came in deciding the size of the first application of facilitation. Trying to control the change by making it too small wouldn’t create the interest needed. Making it too big would result in us having a chaotic change on our hands.

We decided to establish a handful of practice grounds where we test new ways of working. Where it is OK to be innovative, to test, to fail and to learn. That meant that all the tools the facilitators used were “something we could use in the future”. This sounds more like emergent, self-organising language. The alternative would be to describe it as “this is our new way of working”. This sounds like control and would have caused more resistance.

The facilitators introduced a tool, tested it in a collaborative manner with the teams, and asked for feedback. Adjusting the tools in collaboration with the factory teams became an important part of the journey.

External consultants are like chillies

Of course, consultants can bring that added new knowledge that can “spice” up the way in which an organization thinks and acts. Use too many though, and the situation can become overwhelming and doesn’t seem to leave a good taste.

Our advice is that external consultants (including ourselves) add value where the expertise can fulfil a strong need. In this case, we were two consultancies collaborating around the client’s needs. One company was training all managers and internal facilitators in Lean principles and tools. And then us, bringing expertise of how to engage and train internal facilitators in interventions and methods. By using the skill sets from each independent company, the client got the best of both worlds. And since the set-up was collaborative, there was never any competition between the consultancies. Rather, there was a will to learn as much as possible from each other. And to leave the client with all the capabilities to lead this change themselves—now, and in the future.

Bootcamps really work...and they are tough too!

The facilitators’ training took place in Bootcamps. These were profound and intense training experiences of four workshops lasting a full week. Each camp had 24 participants from all over the world. What the nominated participants had in common was a huge interest in making change happen. The Bootcamp consisted of four weeks of training. This was a real investment, both from the organization and from the facilitators themselves. This investment ensures the learning is thorough and not a quick fix. This is one of the reasons it is still referred to as one of the most successful transformations ever made in this company.

During the Bootcamp, the facilitators learnt about:

- Lean manufacturing, similar to the approach used by Toyota
- Facilitation and facilitator competencies
- How to work with their internal clients (that is, the local factory lead team)
- How to handle resistance
- How to inspire change
- How to train others in basic facilitation skills so the machine could grow itself—to ensure the process continued being emergent and self-organising.

During the Bootcamp, the facilitators also formed very strong connections with each other. This made it much easier for them to share learning, and support each other, during

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the change. Each Bootcamp group became like a “cell”. This cell continued working like a ‘wirearchy’ — a connected web of people with common interests. This is very different to the traditional hierarchical structures found in organizations.

Using the ‘wirearchy’ - a connected web of people with common interests

In total there were four separate Bootcamp groups, each with 24 facilitators. When later groups started their learning journey, the previous groups had already made great progress. They could share best practice with their new facilitator colleagues. The “cells” communicated with each other and became a very important support structure to make the change happen.

The facilitators learnt how to contract with internal clients, the factory managers. This was a very important element in what made this transformation successful. This is a key competency among the IAF Facilitators. For those reading this chapter who are internal facilitators, we urge you to develop this key skill. Many problems that we have seen emerge in a change process are due to poor or unclear contracting with the client. Take care to do this thoroughly before commencing work with the wider group.

Each factory manager felt that they had their “own” team of facilitators when it was their turn to start working on Lean. Speaking their language and being very aware of the challenges that specific factory was facing was extremely valuable. The facilitators trained the leadership teams in how to model the way with facilitative tools. They facilitated the first rounds of improvement activities with great success. The success spread from the “practice grounds” in the chosen factories. As a result, new factories started to work with their internal team of facilitators.

The methods and principles of Lean spread like a virus in a body. And so did the experiences the facilitators gathered from the different teams they worked with. In total, the facilitators supported the factories, their leadership teams and at the workplaces, for around two years. Many of the factories continued to use the facilitators for new projects.

Being an internal facilitator soon became an established role in the company. And being a facilitative leader became a standard for good leadership. ‘Manufacturing Excellence’ had become so successful that it was soon renamed ‘Business Excellence’. It had seeped into marketing and finance functions too, and now has the name of the The Company Name Way. The icing on the cake is that several of the facilitators continue to attend IAF conferences. In fact, one has become an IAF Certified™ Professional Facilitator (CPF) in her own right.

We have leaders who can facilitate change, not just manage it. They make the change “stick”.

And what about Mr. Johnson? When we spoke to him a few years later, he said, “This is the most successful transformation our company has ever managed to make! We have real buy-in from all factories worldwide. Our internal resources and facilitators are making it happen. We have expertise from external facilitators and consultants to ensure we are not making too many mistakes. We have leaders who can facilitate change, not just manage it. They make the change “stick”. And we have a new role in our company — The Facilitator!”

Example #2: Facilitation to Change Culture in a Digital World

“Why is it so difficult for managers to transfer what they have learnt at leadership development programmes back to the workplace?” Managers went to an off-site to develop change management skills before leading a major transformation. There was a lack of noticeable change in behaviour, creating frustration.

The insurance company Carina worked for was facing massive change. Digitalization is the name given to a range of technology solutions that change the way an organization functions. These include innovations such as artificial intelligence (AI), advanced analytics and voice recognition. Incorporating these into the company’s web-based application was the plan. This digitalization had already made a huge impact on how the employees interacted with clients. Carina remained convinced there was more to come.

Sending managers to off-site Leading Change programme seemed relevant at the time. But they struggled in leading change and transformation when they got back. They became lost in the urgency of day to day demands.

“We should send all employees on this programme together with their managers,” Carina said. “That way they would develop together. And most of the challenges in the transformation we face could get fixed in an atmosphere of mutual learning, whereas now we have leaders coming back and planning and executing change without their teams’ input, in a unilateral way. Yes, let’s do it! We’ll create a learning environment where we all go through change together. We’ll learn and develop at the same time. We need to work out

The idea of a team having a rich dialogue without the notion of “boss” and “subordinate” is an impactful way of working

how this will affect an organization the size of ours, that’s 3,000 people!”

Most organizations spend a lot of time developing capabilities in change for managers and project leaders. Often sending them on programmes “away” from their daily work. And away from the people they later will (hopefully) involve in change. We

started to ask ourselves: Would it not be better to develop leadership skills for facilitating change with co-workers in the same room, so the time from learning about facilitating change to changing things becomes much shorter and easier? In other words, training leaders to be facilitators with their own teams in bringing about change in the workplace.

We have tried this approach in many different organizations and, for many, it is a revolutionary way of thinking and working. To have the employees present in the room where leadership development and change planning is happening. The idea of a team having a rich dialogue without the notion of “boss” and “subordinate” is an impactful way of working. Medarbetarskap is the name given to this in Sweden. The literal meaning is “work-with-ship” as opposed to leadership...where everyone develops.

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This example comes from a large insurance company. The company had defined four important areas for leaders and employees to develop skills and capabilities—to be able to handle the change and transformation they, as individuals and the company, were facing:

- Leading myself. How to be accountable in my daily job. What would I do if this was my own business, with special focus on handling ambiguity in change?
- Leading and working in teams. How to collaborate with others when delivering results, even if team constellations might change.
- Leading the business. How to focus on clients and business needs. An entrepreneurial mind-set even if we go through internal change.
- Developing the business. How to find new and better ways of working and to continuously improve.

For each area, we created a dialogue guide with exercises and tools aimed at challenging the current ways of being. Exploring and working on new and better ways. These would help people reflect on how they were being both as a team and as individuals, including the leader of course. The leaders experienced training in:

- how to use a facilitative leadership style;
- how to use different tools and methods;
- how to be able to facilitate dialogues in their teams;
- how to inspire action;
- exploring what ‘resistance’ to change really is and how to overcome it;
- how to create a safe environment for sharing and learning in the team; and,
- how to use each of the five dialogue guides.

At the workplace, they arranged a series of dialogue meetings. At least four took place, one for each area. Each meeting took approximately two hours. Many teams worked much more with the dialogue guides, using the exercises several times.

It was inspiring to see how both leaders and team members enjoyed having the time to sit down together and discuss how they could develop. Both as the leader of the team, and as team members in the team. They were using the tools to plan and prepare for change in their teams and also as reflective methods during the more challenging parts of change. For example, when they were shifting from one IT system to another, which caused a lot of frustration in teams. The tools were also used when it became known that some jobs were going to disappear when people retired.

The dialogue guides have the same design as a cookery book, with many different dishes to choose from within each area. Take, for example, the dialogue guide for the “Leading Myself” session. Here, we used a lot of transparency exercises to build trust and understanding for each individual in the team. An example of a specific exercise is the “Line of Life”. The teams discussed what had made them the people they are today. Sharing things

Facilitating Change and Transformation

Table 1: Leader's Meeting Checklist

Well Before	Are you clear in your own mind that you know your purpose and plan in running the dialogue session?
	Working backwards, how will things be different afterwards, both in mind-sets and in skill sets?
	What needs to happen immediately after the session to build momentum out of the meeting?
	What climate do you want to encourage in the meeting?
	How will you establish your own role as host, and the different sub-roles that involves?
	Stepping into the shoes of your participants, how can you have them arrive and enter into the spirit of things? What forms of resistance might there be? Are you ready to handle them in a way that's consistent with your hosting role?
	What 'curation' plan do you need to have, if any?
	What 'red thread' do you need to run between this meeting and other activities and meetings, to help people make the most of it?
Just Before	What's the invitation you are extending? Do people need to do any preparation? Have you had informal contact with those coming? Can you reduce the meeting time by what you do ahead of time?
	Have you got the right kind of meeting space? Do you have enough elbow room? Can you use the space a bit differently to set a particular tone? Have you allowed time before the meeting to get in a bit early and set things up the way you'd like them to be?
	Have you assembled all your supplies? Making it a flowing experience. And arranged for water, food, coffee? Where are the washrooms? Is the room the right temperature?
Arrival	How are you entering people into the space, managing boundaries and late arrivals? Perhaps a rolling start?
Begin	How are you establishing the agenda and group contract? (brevity, privacy, phones, presence throughout, building on each other's work, making room for difference, etc.)
During	Are you working with pace and variety, making sure output from one part of the meeting become input to the next?
End	What's a nice strong ending that will help close the meeting space?
Leave	How will people leave, and what will they do next?
After	How will you communicate with people next, or share insights with other facilitators and teams? (that is, model the practices here!)
After the after	When and how will you go back to participants to strengthen connections and feedback/forward loops?

like values, important role models, ambitions they had and ambitions they have for the future, etc.

Other tools included more typical facilitation methods. For example, Force-field Analysis to figure out the current versus the ideal way of working in the future, and to determine driving and hindering forces in change. Also, the Ease and Impact Grid to prioritise activities and actions ahead; De Bono's 6 Thinking Hats to reflect on learnings, as well as

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Icebreakers and Energisers to inject energy into the teams when needed.

One important element of each guide is the checklist provided to the leaders (Table 1). This ensures they will get the most from each session. This kind of preparation gives many important messages to those participating. For example, “This is important. Your participation is vital. I, the leader, care...this matters!”

The beauty of this way of working is that the managers develop into facilitative leaders. They learn how to lead change together with their team members in a mutual learning context.

*This is important.
Your participation
is vital. I, the leader,
care...this matters!*

The guidelines showing how to use the tools were very extensive. As a result, the leaders felt safe and competent when applying different methods. The co-workers enjoyed the facilitated sessions. One employee said, “It helped me go through this transformation. I’m not sure I would have coped without these sessions. It was hard going to work some days, especially when we knew we were going to get negative messages around outsourcing and similar things. Yet knowing that we were all in this together and we got the sessions available to structure as well as debrief the change, helped me. I got a much better manager after the sessions, and I became a much better, co-creating employee afterwards.”

Carina was particularly delighted as it meant the changes became embedded in the daily work patterns. Regular, short scheduled meetings replaced costly and complex off-site interventions. To use facilitation to change a culture is not a quick fix. It needs a lot of interventions over time, which requires patience and persistence. The leadership team needs to sponsor the facilitation. It’s also important to move beyond facilitation being the domain of external consultants. Instead, facilitation becomes used all the time in everyday meetings run by the team leadership or the meeting leader.

But what about staying neutral, you might think. And what about staying focused on the process more than the content? Of course, there were some managers who were uncomfortable at first. But with a light touch from an internal or external facilitator at the first meeting, most leaders wanted to take the rest themselves.

One question that often emerges in this kind of setting is: Can managers stay neutral and step out of a “normal” decision-making role? We make a clear distinction between the facilitator, who is multi-partial (on everybody’s side), and the leader using facilitative skills.

*The facilitator is
‘multi-partial’on
everybody’s side*

The latter has a dual role. First, in ensuring a good process and second, engaging in the content somewhat. In our experience, leaders are usually very good at stepping in and out of roles. And when the co-workers/employees become comfortable with facilitation, they also help with role clarification. “Are you in a manager role now? Or are you facilitating this discussion? What process will we use for decision-making in this meeting?” We often hear these questions from team members who have experienced good facilitation. They know the difference clear and concise communication can make. This approach creates arenas for mutual learning. Arenas where inclusiveness and collaboration is in play for real. This is where we see the huge impact facilitation has in organizations, with both leaders and

co-workers alike. This is so much better than training leaders to be in unilateral control of change.

Example #3: How Facilitation Helped Two Clinics to Become One

“Our two hospitals are only 30 km apart, yet it seems like the distance between us is as if you were taking the whole way around the globe and back.” A political decision was made to merge the two hospitals into one. First because they were so close to each other. And second, from a medical perspective, they could provide better health care with larger clinics and more specialists.

The clinics, previously split in two physical locations, were now going to be working as one. The merger had huge implications. Not only on the medical processes and procedures but also on staff. Now there was a need to commute between two locations. Another implication was the quite different cultures in the two hospitals. This could not be underestimated or overlooked. “How on earth can we get our two clinics to work as one,” the director of Intensive Care, Per, said. “Even if our staff understands that this is better from a medical perspective, it’s still a challenge to make this happen.”

The Intensive Care Unit in one of the hospitals was larger. The staff coming from the smaller unit felt like their ways of working would be “eaten up” by the larger of the two even though they had more experience in advanced trauma care. “The mind-set in the larger clinic right now is that they will ‘take over’ the staff from the smaller one. And that the smaller one will close, which is not true,” Per said. “In fact, we will focus on becoming ONE clinic, with one part specialising in trauma and emergency care and the other specialising in elective and planned care. This is not about shutting down one. This is about shutting down both clinics as they operate today and rebuilding one new clinic that can deliver intensive care according to our new mission. And at the same time giving a value proposition to our community members. But how can we make it happen? I need your help!”

The hospital knew of facilitation, having experienced positive results in the past. Internal and external facilitators had supported single workshops as well as longer processes at the hospital. The focus of the workshops was knowledge sharing and enabling collaboration among teams.

So when two important clinics need to merge into one, both the Hospital Director and the Director for Intensive Care asked for facilitation support. They understood that facilitation would be vital in making the merge happen in a way that was inclusive and collaborative.

The WHAT was already decided—make two clinics one. But the HOW could be planned and executed in many different ways. With previous positive experience and good results from facilitation, the management team at the hospital decided to invest in an internal team of facilitators. They would support the whole change process from start to finish. A process that would take around three years to complete.

The internal facilitator training explored how to use and intervene with solution-oriented methods. These would focus on strengths, what was working in both clinics and how to

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grow and make more of that, rather than focusing on what was wrong. Employees were invited to large group sessions in the early stages. The aim was to prepare for change in an inclusive and collaborative way. Appreciative Inquiry (AI) was used as a philosophy and method, which made it possible for all voices to be heard. An AI session usually starts with interviews in pairs with a fixed set of questions in the interview guide:

1. Tell me about a situation where the clinic you work in was functioning well. What happened? Who was involved? Why was it such a positive experience?
2. What core values or principles are guiding the work you do in your clinic?
3. If you had a wish, how would you like to see our united clinic work in the future? What does the 'Future Perfect' look like?

The employees were interviewing each other, one from each clinic. Already at this first step, they were finding some common ground working together. Next, we asked three pairs to form groups of six people, and in these groups, they re-told the stories they captured during the interviews. The groups had two tasks. First, to capture the values or principles they seemed to have in common in the group. These were the themes emerging from question 2 in the interview guide. Then to visualise their Future Perfect when they were all working together as one successful clinic. This came with inspiration from question 3.

This process helped the employees from both clinics to see how much they had in common. To see that both clinics had strengths to contribute with and that their shared visions of the future were aligned. By this way of working, a natural curiosity occurred and replaced the doubt and fear that had existed earlier. After these initial sessions, task forces with participants from both clinics assembled. Their focus was working on different subjects, such as aligning medical processes and procedures, aligning work schedules, establishing practice grounds where knowledge sharing happened and working on the elements in the culture where they wanted to see a shift happen.

An invitation to take part in task forces or work groups went to all employees. Also, trained internal facilitators got into action using different methods and processes.

In total, we trained around 30 facilitators who supported all the different clinics at the hospital. They were people with an interest in facilitation and background as nurses, doctors and from more administrative roles. For three intensive years, they provided facilitation support to the organization. They were highly appreciated too. When we interviewed the Director for the hospital and the Director for the Intensive Care Unit, both said it would never have been possible to achieve this merger and transform the way the clinics were working without the facilitation support. They both admitted that it can be challenging to work with very specialized and professional groups like nurses and doctors. Yet because of the professionalism of the facilitators, and the fact that they were also coming from the same organization, it created a sense of “we are all in this together”.

It would never have been possible to achieve this merger and transform the way the clinics were working without the facilitation support

Reflections and Tips

Sometimes we are asked by colleagues working as external facilitators: “Why do you train so many internal facilitators? Would it not be more lucrative for you to do more of the work yourself, as external resources to these organisations?” Well, for us, the ambition has always been to spread the power of facilitation. Then you need to find ways of “scaling” what you do.

If every year you train 30 internal facilitators in 10 organizations, we have 300 people using facilitation and helping organizations to deliver even better results. If then, in the 10 organizations, you train 100 managers to use facilitative leadership in times of change, then we have 1,000 facilitative leaders. If each leader uses facilitative skills with their team of 10 people, we have enabled more collaborative and inclusive ways of working for around 10,000 people...and that is the power of facilitation!

Remember the well-known proverb: “Give a man a fish and feed him for a day, show him how to fish and you feed him for a lifetime.” This is an abundance mind-set that we choose to operate from in all our work. An abundance mindset is the alternative to a scarcity mindset. You can choose to either view the world as abundant or scarce, but they cannot co-exist. The abundance mind-set flows out of a deep inner sense of personal worth and security. It is a paradigm that is grounded in the belief that there is more than enough for everyone.

As a single consultant, or a “one-man-band”, it’s more difficult to reach so many, at least in a short time. Of course, you can make great impact, going deep and doing profound work with smaller groups. And it can be extremely rewarding for you as a facilitator. But if you want to “scale up” your work, you either have to find colleagues to network with or develop internal resources that do the bulk of the facilitation work themselves. In all our cases, the organizations have become totally independent of us. That, for us, is very rewarding.

The networking dimension when developing internal facilitators is very important. By doing facilitator training together with internal colleagues, you build a great community for sharing best practice—and for sharing difficulties and helping each other in more challenging assignments.

Being an internal facilitator has drawbacks compared with being external. For example, some might question the lack of examples from other organizations. And if you “fail” with assignments, it can be tricky to recover your reputation as a skilled facilitator. So, we spend time on helping the clients we work with to set up the infrastructure to ensure facilitators network and support each other. We do the same for leaders too. This is done in many ways—through quick Skype calls every month, by offering “booster sessions” topping up skills and inspiring to action. Or by using peer assist or coaching pairs where pairs of facilitators can support and challenge each other. In many of the organizations we work with, the networks of facilitators reach out to other networks in other organizations. This way, the learning and success sharing continues beyond the boundaries of the organization.

In Sweden, for 12 years we have arranged the annual conference “Faciliteringsdagarna”

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(Facilitation Days). This promotes facilitation, and creates a place for learning, sharing and networking between facilitators, networks of facilitators and facilitative leaders. This conference usually attracts between 100–150 facilitators, many of them internal. All see it as a great opportunity to network with others. Many leaders and clients also attend and contribute with their perspective on how facilitation is making a difference in their organizations and what results it creates.

Bringing it together

These three real-life examples show how clients with complex challenges, in quite different settings, can be helped with the power of facilitation. Whether it's in the guise of facilitative leadership, facilitation skills or adopting the role of the facilitator, what they have in common is the belief that real and lasting change can only be achieved by engaging those involved in it.

We have been working in the field of facilitation and organisational change for many years. During that time, it has become obvious to us that what works in one organization doesn't necessarily apply to another. After all, organizations come in many shapes and sizes. With that in mind, remember there may be unique clues in any organization of what works. These will help facilitation of change and transformation succeed.

We are passionate about building communities of internal facilitators. And we have found that building that same passion and capability with internal facilitators takes time and effort. Furthermore, giving the facilitators freedom to act in helping teams requires that commitment too.

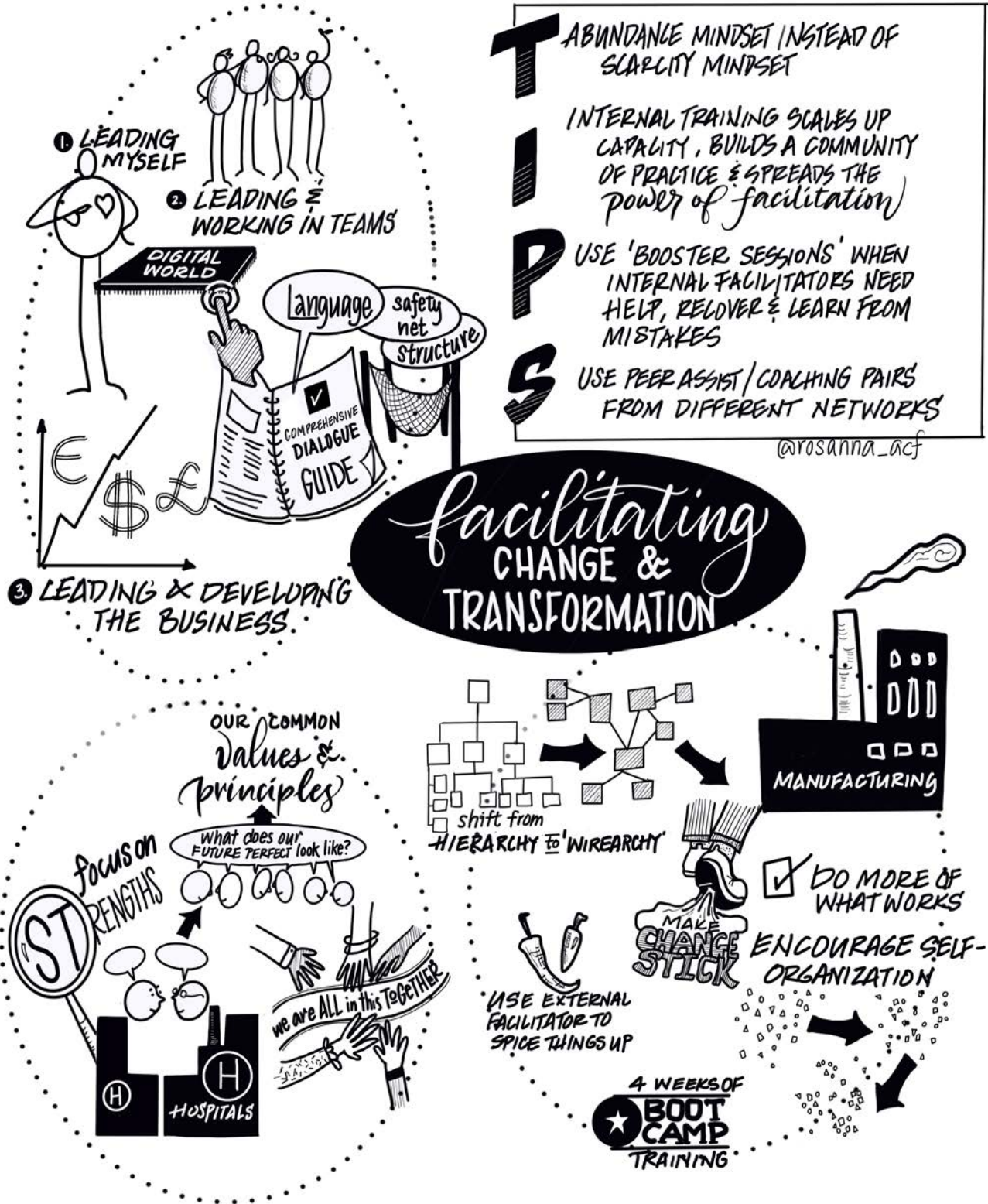
The same applies to leaders who are seeking to create a culture shift through facilitative dialogue. It's essential that time and effort is dedicated for real change to occur. And the results can be astonishing.

Change comes about one conversation at a time. Organizations become world-class one person at a time. So whilst leaders becoming more facilitative in their approach isn't a quick fix, the impact over time can be enormous.

Finally, there is one thing that has been the ultimate driving force for us over the years. It has been to see the results that internal facilitators can help their teams achieve for years to come. As Margaret Mead almost said, "Never doubt that a group of thoughtful committed facilitators can bring about sustainable change; indeed, from our experience, it's the only thing that ever has."

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Visual summary by Rosanna von Sacken



Chapter 3

The Power of Facilitation for Critical Thinking

Mark Bain

Today, the speed and volume of information can be overwhelming. Critical thinking skills give people the tools they need to actively listen and critically consume information. Critical thinkers challenge assumptions and zero in on the information that leads to the path of innovation rather than complacency.

The process of becoming a “thinking organization” begins with the organisation’s engine—its people. In order to gain the benefits of being a critical thinking organization, collaborative critical thinking needs to be embedded into the culture of the organization.

Organizations that want to move in this direction will need to make changes on several fronts to establish the needed processes and open up the benefits of enhanced collaborative critical thinking. The power of facilitation can help with this shift in corporate culture. But maybe, more importantly, critical thinking can amplify the power of facilitation by helping individuals, groups, organizations and communities examine all information, all points of view, and all perspectives, in a way that enhances their ability to think better together.

This chapter will examine how critical thinking, in concert with communication, collaboration and creativity/innovation, can amplify the power of facilitation.

What is Critical Thinking & How Can It Help?

In 2005, the Korean Journal of Thinking and Problem Solving published a paper titled “Current Developments in Creative Problem Solving for Organizations: A Focus on Thinking Skills and Styles”.¹ In this article, the author presents a number of studies that examine how organizations and employees who trained to solve problems creatively increased organisational successes. Outcomes like cost savings, improved decision-making, increased employee motivation and heightened learning attitudes were all attributed to increasing the Critical Thinking skills of both the organization and the workforce.

Inspiring a workforce to think critically requires three key organisational elements: effective and open communication, a willingness to collaborate at all levels of the organ-

ization and a culture that embraces creativity and innovation. This allows the collective intelligence of the entire organization to grow and expand.

Organizations that encourage critical thinking develop operational dexterity. They are nimble and adapt easier to unseen forces in their future. Research has shown that organisations implementing these processes can “... expect to capture 20 per cent more of their future revenue from new sources than their more traditional peers.”ⁱⁱ

How to Become a Critical Thinker

There are three core elements needed for a critical thinking mind-set: curiosity, scepticism and humility.

Curiosity focuses people on the ‘why’. It helps to discover the root of the discussion/problem/issue. Curiosity also makes us wonder about the motivation behind the information we consume. A curious mind will consider why this information is being provided? Why are they expecting me to agree? What assumptions must be acknowledged about the information?

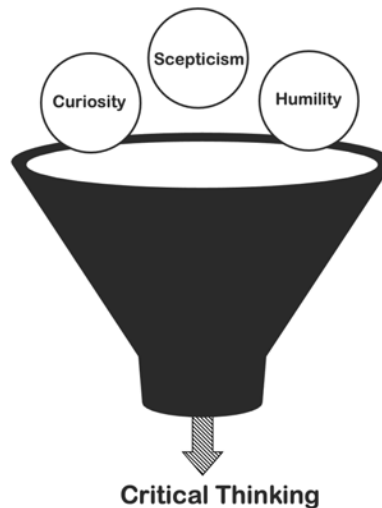
Curiosity develops the desire to actively listen to others, inquire as to what they mean and engage in a meaningful inquisitive dialogue. Curiosity builds listening skills, which are always on the alert for misunderstandings, biases, assumptions, hidden meanings, etc. Curiosity leads to a willingness to listen and consider alternate points of view. It allows us to consider information before judging its validity or relevance.

Along with curiosity, scepticism is a necessary part of critical thinking. Scepticism builds the ability to be nimble with ideas, opinions and information. Scepticism doesn’t mean that everything is automatically questioned and discounted until proven beyond a reasonable doubt. It means that you are always on alert for information that is unreliable,

Critical Thinkers qualify information “inflows” which helps to ensure the quality of idea “outflows”.

misleading, biased or born from singular experiences. Scepticism allows individuals to zero in on the validity of information and its use to define the thinking logic. For example, trying to decide what type of landing gear a rocket needs to land on a moon made of cheese focuses on the landing gear debate. Scepticism refocuses the discussion first on the likelihood the moon is made of cheese and where we got that information. It empowers critical thinkers to qualify information “inflows” which helps to ensure the quality of idea “outflows”.

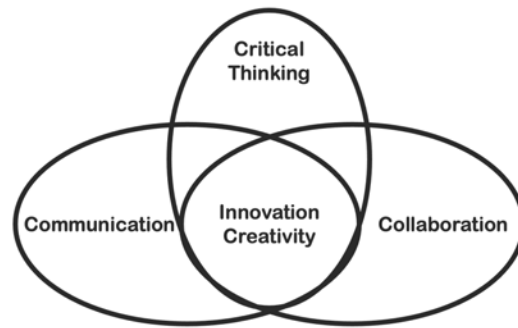
The last element of a critical thinking mind-set is humility. Humility allows us to realize that being wrong can be a positive thing. Humility allows us to expect that our ideas,



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thoughts and assumptions “can” be misplaced. It gives us the ability to recognize that if we hold on to “wrong” information we may use that information to make bad decisions. The quicker we can let go of “wrong” information, the faster we can move away from incorrect knowledge paths. Critical thinkers are not in a constant state of worry about being proven wrong, they become open to seeing different options and opportunities. They become prepared to weigh new information on its merit, rather than on its ability to support foregone conclusions. This behaviour frees them to pursue, gather and critically consume new information.

It is sometimes hard to openly admit we are wrong. However, holding on to information, ideas or assumptions that are wrong is a burden on our thinking. A willingness to accept that we “may” be wrong, opens up the potential to see things from a different perspective and overcomes the functional fixedness of our ideas. We cannot think together better, if we are unwilling to challenge our own ideas and assumptions.



Of course, curiosity, scepticism and humility are not just needed to build a critical thinking mind-set. As the other chapters of this book have espoused, a healthy dose of curiosity, scepticism and humility are also requirements of thinking together effectively.

Critical Thinking & Communication

Institutional knowledge is that hard-won experience built up over years of experimentation and learning in the organisation. It's the lessons staff learnt from “doing” the business of the organization. Becoming a critical thinking organization means that we continuously share the wisdom of the organisation. A big part of stopping knowledge drain from organizations begins with ensuring institutional knowledge is not stored by a few but is shared by all. Organizations with a critical thinking culture ensure this knowledge is treated as an organisational resource.

Teams will quickly assimilate this new “knowledge fuel” into their own idea and decision-making engines.

Organizations committed to cultivating critical thinking take active steps to ensure all business meetings, discussions and processes are treated as learning opportunities. Regular ongoing discussions about what went well, what failed,

how we can do better, what we won't do again and how we can change are important. Distributing this learning to everyone strengthens the collective intelligence of the organization. Often, I suggest to managers that they embed Focused Conversations into every meeting, for every project, to encourage reflection, learning and sharing among team members.

Activities like Focused Conversations spread the learning from all points of view, ensure

staff take the time to reflect on and think about what they have learned and acts as a catalyst for engagement by everyone. These collaborative processes should be designed to spread the institutional learning through information sharing, transparent evaluation, reflection and continuous improvement. This process has the secondary benefit of allowing new staff to acquire years of learning in a very short period of time. Spreading lessons learnt from “the individual” to “the organization” allows everyone to problem-solve, learn from mistakes, contribute to new ideas and examine business processes together.

Treating institutional knowledge as a shared asset allows groups to learn from their own experiences by sharing their own reflections as well as learn from others’ experiences across the organization. Whenever you gather staff, introduce a few facilitated critical thinking conversations to encourage people to share and expand their institutional knowledge. Encourage storytelling of how trial and error processes led to new techniques. Promote discussions regarding learned experiences, adversities and wins. Pose “what if” scenarios to encourage deeper thinking and advanced learning. Conduct Agile type design sprints to solve problems and consider alternative processes. Teams will quickly assimilate the knowledge they gain, as well as the process of how to think together better. They will then incorporate this knowledge into their own ideas and use it to make better decisions.

Critical Thinking & Collaboration

Open communication leads to sharing of ideas and is the basis of collaboration. Collaboration leads to organisational learning and the development of innovative solutions. As collaboration becomes the norm, collective intelligence builds, innovation flourishes and employees become enthused and engaged.

For several years, Gallup has been surveying the American workplace to quantify the level of employee engagement at work. In 2017, Gallup reported that only one-third of employees in the US were engaged at work. These numbers hold up across each generation—Baby Boomers, Gen Xers and millennials—dispelling the myth that disengagement is just an issue with the younger crowd. The research shows similar results across educational levels (high school to postgraduate). Gallup went on to report that “disengaged employees cost the country somewhere between \$450 and \$550 billion each year”.ⁱⁱⁱ

Critical thinking combined with collaboration is the inoculation staff needs to move from a state of disengagement to engagement. An atmosphere where employees are encouraged to collaborate and share their ideas, stimulates employee growth and a sense of worth. Collaboration affords employees the time to test their judgements, ideas and reasons with others and openly contribute to real change.

Critical thinking organizations support their people to brainstorm through problems and think together using collaborative processes. Employees begin to take a more holistic view of the organization. Cross-organisational collaborations transform discussion from, “I just do this every day,” to enthusiastic exchanges about who does what and why. Meetings become discussions that flush out new ideas, smooth out process backlogs, stream-line business practices and reduce duplications. Business processes across the organisation

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become disentangled as staff finds ways to work together better. Ideas that don't work are quickly revamped because the lines of communication are opened. Most importantly, employees take ownership for proposing their ideas, they feel free to experiment and are interested in trying out new methods. In a short period of time, employees become engaged in executing best practices they helped author and they are invested in making their ideas work.

In order to nurture collaboration, organizations need to strengthen the pathways for authentic conversations among staff and across staff units. Formalized processes need to be put in place to encourage the gathering and sharing of ideas. It is more than just putting people in the same room. Organisations need to embrace the power of facilitation in both formal and informal settings. Leaders need to provide the time and space for staff to engage, interact, exchange ideas and experiment. And as was discussed in the last chapter, develop facilitative competencies and skills across the organisation.

More and more people are reporting to me that the velocity of work doesn't give them time to stop and think through the numerous problems they face every day. Employees are busy "doing" with no time to "think" about options or discuss alternatives. More and more people are forced to make snap decisions, on their own and with limited information. They make choices on the fly, without input from others, because of the rush-rush mentality that is prevalent across the organization. Consequently, the threat of making wrong decisions often leads to procrastination. Pushing decisions down the road or ignoring the need to choose is often preferred to that of making a wrong decision. Staff I have interviewed tell me that they would rather be criticised for not making decisions than be known as a poor decision maker. But the idea of taking the time to collaborate with others to make better decisions is not even considered.

"People say some of the best innovations happen on the back of a paper napkin, but what really ignited that innovation was the collaborative dialogue that happened around the table".

Collaborative organizations embrace corporate face-to-face (or screen- to-screen) activities, which give people the opportunity to verbalize their problems, seek alternate ideas and gather useful intelligence. Collaborative organisations nurture critical thinking in a way that supports this process. As illustrated in other chapters, collaboration expands collective intelligence. But it is not only the collective that benefits. Each individual within the group is able to add the wisdom of other group members to their personal "data bank", which advances their own critical thinking, allowing them to make better decisions. This process gives people the time to dissect their problems, discuss alternatives and test solutions with others in the moment. This helps staff gain the confidence to more easily decide on a solution and they are more apt to make and execute decisions. People say some of the best innovations happen on the back of a paper napkin, but what really ignited that innovation was the collaborative dialogue that happened around the table.

Many management teams I deal with talk about organisational size as a barrier to collaboration and engagement. In fact, the Gallup report, noted above, found that around 1,000 employees is the "tipping point" for employee engagement issues. But as seen in other chapters, size should not be considered an impediment to collaboration or engagement.

My colleagues who authored earlier chapters in this book, all provide excellent examples of facilitated processes that have resulted in high engagement and significant outcomes across nations, communities and large organisations. The power of facilitation in an organisation with a culture that is built on critical thinking trumps concerns over size every time.

Cultivating critical thinking within the organisation not only empowers employees to disentangle and streamline the business process, but it is also good for the business bottom line. According to a study by Kenex, engaged companies had five times higher total shareholder returns over a five-year period than less engaged companies.^{iv} A 2011 study by Towers Perrin found that companies with engaged employees had six per cent higher net-profit margins.^v Striking a critical thinking culture in the organization engages employees by practising open information sharing, valuing the contribution of everyone at all levels of the organization and involving employees in the decision-making process. It instils a sense of belonging, worth and satisfaction that is just what disengaged employees crave.

Critical Thinking & Creativity/Innovation

Strong critical thinking organizations train their employees to be flexible and help them build the skills needed to adapt and change. Rigid corporate cultures don't bend or flex with shifting demands. Their set-in-stone business processes signal to employees that choices are limited, and new ideas are not welcome. Rigid organizations have little interest in building the skills employees need to innovate or adapt to shifting requirements. When faced with even minor deviations from the business norms, these organizations "buckle" and staff become unable to deal with rapid priority shifts or accelerated business needs.

Critical thinking organisations embrace creativity and innovation. Through open lines of communication and by encouraging collaboration, critical thinking organisations support and encourage staff to be creative and innovative. Encouraging staff to explore new ideas, propose alternative solutions and challenge current practices leads to a solution-focused 'can-do' attitude across the organization. This leads to a culture where employees are increasingly able to action and execute new solutions/ideas because they are practised problem solvers who are change ready.

When organizations embrace and encourage creativity, they open the door for staff to collaborate and solve problems in new and better ways. When employees realize they have the authority to be creative, and that management supports this behaviour, they begin to look at problems not as obstacles but as challenges. This creative stimulus not only leads to new and exciting ideas but sets the stage for employees to be fully engaged in organisational change and transformation initiatives.

Creativity produces innovation. The corporate struggle to find ways to innovate, drop outdated approaches and explore new ways to predict and tackle future risk is globally interconnected. An organization that embraces and nurtures critical thinking, facilitation competencies, open communication and collaboration enables employees to not only be

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aware of the challenges facing the organization, but to also be part of the solution.

I joined Chrysler Corporation as a young graduate. Chrysler was just emerging from a very difficult time and was clawing its way back from near death. I was first trained in one of their “learning branches”, then transferred to their largest North American branch. My new branch was paralysed with escalating losses and a growing level of delinquent accounts. Delinquency rates had climbed to 12 times the corporate average and we were leaking money from all business operations. The week I arrived at the branch so did the new computer system, which was designed to support account services.

With a computer background from my undergrad studies, I decided to see if the system could be leveraged to mass communicate with the ever-growing list of delinquent customers. I quickly found a way to produce form letters for all past due accounts, so an automated reminder went out to customers. At the same time, I produced a stern warning letter for severely delinquent accounts. My immediate manager assumed all the time I was spending working on this new project was just “fiddling” with the new system. He told me to drop what I was doing immediately and get back to my “real” job. However, my branch manager overheard the conversation and asked me to explain what I had been working on. He asked questions and listened to my answers thoughtfully. After a long discussion, he encouraged me to pursue the idea.

Within weeks we were generating hundreds of customized letters and reminders automatically and delinquency rates fell dramatically. Within a month I was assigned two helpers and together we began generating automated reminders as part of the ongoing business model. The success of the automated system echoed across the entire organization and similar systems were set up in other branches.

Recognizing that staff can develop the next new way of doing things, define a new process or develop a new product is only part of the critical thinking process for the organization. Training organisational leaders to listen for and be open to that next new “thing” allows creativity to flourish and innovation to take hold. Managers can no longer wait for creativity and innovation to come—nurturing innovation is the new role of 21st century leaders.

Committing to enhance critical thinking within the organization is only half the battle. The other half is to strengthen the pathways for more collaboration across the organization. This collaboration growth brings the organisation huge advantages. With processes in place to encourage gathering and sharing ideas, individuals naturally begin to explore job issues with others, both formally and informally. This process brings groups together, often across organisational lines that don’t usually meet, interact and exchange ideas. Employee dialogues that slice across organization silos bring deeper and richer understanding for innovators and problem solvers.

Conclusion

Using facilitation to help the organization develop a critical thinking culture is a win-win. While the facilitation process guides the group interaction, those in the group are free to work the “problem” and learn from each other. Using a facilitated engagement allows the group to not only tackle the problem but to also begin the process of developing the skills needed for critical thinking. The facilitator works on guiding the group and establishing processes to heighten the collective intelligence via collaboration, open lines of communication and creative problem solving. The main task of the facilitated meeting is to find a solution to the problem at hand. However, the facilitator takes the extra step to introduce critical thinking tools that over time become embedded into the group’s everyday business processes. Individuals are encouraged to ask questions, understand and challenge their assumptions and contemplate the implications of the feedback they receive. Interactions are organized to tease out bias, explore different perspectives, think creatively and isolate areas where the group needs more information. Groups are coached to listen, digest information, consider options and probe ideas for more details. Teams can “work the problem” across the organisation responsibly in order to identify roadblocks that can be tackled and solved.

Planned group interactions like this expose people to alternate points of view and new ideas from across the organization. The heightened interaction ensures that employees understand the “whole” situation, and everyone gets the opportunity to explore and contribute to the evidence from a different business perspective. Groups are encouraged to explore any prejudice openly, examine their assumptions and look for new and innovative opportunities. They are encouraged to break down barriers that keep them from innovating and explore “what if ” opportunities to open new roads to best practices. The normal “ho humm” problem-solving meeting is elevated to an event that not only produces solutions but also becomes a powerful positive experience that inspires teams to want to “engage” again and again.

The facilitator’s role is to heighten the opportunity for increased dialogue, draw out ideas, help the group through conflict, provide solid processes to reach consensus and document the results. The facilitated process strengthens the group’s ability to leave old ideas and travel new roads. In the end, the group learns to use collaborative processes to develop solutions, cultivate ideas and innovate. Before long, critical thinking skills and processes are woven into the business culture and begin to motivate individuals to deploy the same skill set in their everyday interactions and decision-making.

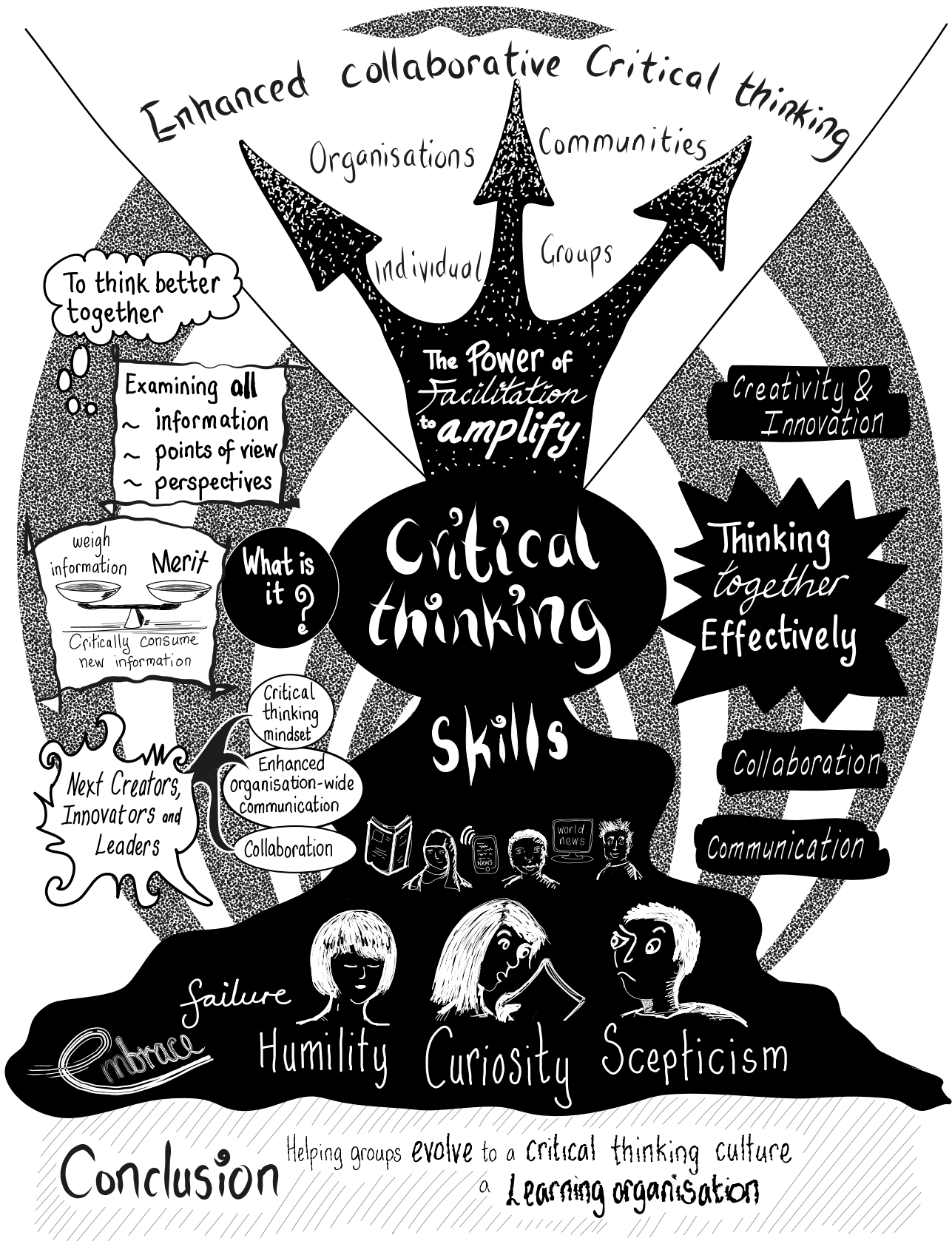
As groups become better and better at thinking together, the processes experienced become a recipe for future collaboration. People become more adept at examining the assumptions and ideas of others. They become better at listening and using new learning to enhance their own ideas. They find new ways to engage colleagues on a continuous basis. They begin to review their points of view and ideas in a way that makes them better contributors and skilled problem solvers. Finally, they become comfortable in an organisation that matters to them and that they feel confident investing in because they can make a difference.

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Critical thinking processes within the organization can enhance communication, collaboration and creativity among the workforce. It is evident that these “learning organizations” foster and teach employees to deploy higher-level thinking processes, which has many benefits. As has been evidenced in this chapter, critical thinking organizations can expect positive ROIs in areas like employee engagement, reduced corporate risk, profitability and lower costs. Additionally, these organizations are creating intelligent nimble work-forces that will be crucial to tackle 21st century business demands. Organisations who empower their workforce with a critical thinking mind-set, coupled with collaboration and enhanced organization wide communication, will surely be the next creators, innovators and leaders.

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Visual summary by Debbie Roberts



Chapter 4

The Power of Facilitation in Resolving Conflicts

Kimberly Bain

This chapter focuses on the power of facilitation as an enabler of positive public dialogues and critical conversations and as a tool to resolve conflicts. The power of facilitation can help leaders, managers, community advocates, public dialogue professionals, mediators, facilitators and anyone who is faced with conflict. It helps to resolve disputes between individuals or within/between groups in a productive, positive and sustainable manner.

Engaging individuals, groups or the public in resolving disputes or wicked problemsⁱ is not about choosing between options. It is not about debating choices. It is about dialogue. It is about conversations. And it is about problem solving. As we have explored in previous chapters, the power of facilitation enables individuals and groups to communicate effectively. It helps people better understand themselves and each other. And it helps people think critically about solutions that can resolve the conflict. This chapter will examine how the power of facilitation can help to create a positive and sustainable resolution to any conflict. Whether the conflict is between individuals, within or between groups or across society, the power of facilitation can help.

When people gather physically, virtually or spiritually, there are bound to be disagreements. The question is: will the disagreements lead to destructive outcomes or constructive ones? Conflict is a normal part of life. Creativity, growth, innovation and learning all need some conflict in which to occur and thrive. In his book *Creativity, Inc.: Overcoming the Unseen Forces That Stand in the Way of True Inspiration*, Ed Catmull describes the key role that Pixar's Braintrust had in creating their successful movies. Catmull claims their success was a result of fostering creativity through candour. It encouraged debate and examination of all points of view and differences of opinion.

Engaging individuals, groups or the public in resolving disputes or wicked problems is not about choosing between options or debating choices, it is about dialogue, conversations and problem solving.

Scientists have used the double-blind peer review process to improve the quality of their research for decades. This process allows them to challenge their own theories, assumptions and methodologies to strengthen their logic and conclusions. As far back as the fifth century BC, democratic societies have used various forms of debate. This dialogue method was designed to ensure public decisions are well thought out. It was also designed to promote logical decisions that were in the best interests of the society they serve.

Constructive conflict has been proven through the centuries as an effective tool to foster innovation, creativity and consensus building. Yet, many of us still view conflict as a destructive force. Mary Parker Follett is often quoted as saying, “All polishing is done by friction.” How can we harness the power of facilitation to help us to ensure that friction polishes rather than destroys human relationships? How can we help individuals, groups and societal factions to embrace the notion of constructive conflict? How do we move from “beat and defeat” to “together we can”?

The Vacuum Monster

In 350 AD, Greek philosopher Aristotle coined the phrase, “Nature abhors a vacuum.” This is based on the principle that nature requires every space to be filled with something. This

*“If necessity is the
mother of invention,
conflict is
its father”*

Kenneth Kaye

is why, when you place an empty container in a sink full of water, the water rushes in to fill the empty space. This theory of the physical universe can help us explain why conflict happens and how to guide the conflicting parties towards constructive outcomes.

Let’s take a typical office example of a conflict situation. Group A makes a seemingly trivial decision to move the water cooler. Group B begins talking among themselves: “Why was the water cooler moved?”, “Why to that spot?”, “Did they do that so they could spy on us when we chat at the cooler?” And on it goes. Next thing you know tensions rise, suspicions start and relationships deteriorate. I call this a full-frontal attack by the Vacuum Monster.

Whether it is a dispute between individuals, a workplace conflict or a large-scale conflict affecting an entire nation, when there is an empty space void of information, it will automatically and quickly be filled with something. Unfortunately, 99.9 per cent of the time what fills that information vacuum causes conflict.

The question we need to ask ourselves is: Why is it that the vacuum is almost always filled with information that leads to destructive outcomes? Why is it that commentators are lamenting the demise of public dialogue in nations around the world? Why is it that political and value-based issues are becoming more extreme and more entrenched than at any other time in our history? Why is it that what, in the past, were considered valuable and informative public debates are now seen as us against them trench warfare? Why have issues like Brexit, Aadhaar, immigration and economic reform become so divisive?

The Science behind the Vacuum Monster

Looking at this issue from a behavioural theory perspective, we can see that the human brain is hard-wired to assume the worst. Consider the work of scientists like Jane Goodall, Andrew O’Keeffe, Antonio Damasio and Richard Tedlow. Their writings help us understand why when someone cuts you off in a car you automatically think of him as an inconsiderate driver. You rarely assume he had a good reason to cut you off. Maybe he was on the way to the hospital to welcome his new baby into the world. Their writings provide insights into why we automatically assume the worst. For example, when no explanation is given or reported describing why an unpopular political decision was made, citizens often assume nefarious reasons. They believe it was about poor decision-making, bad judgement or corruption.

There are several reasons for this. From an evolutionary perspective, those early humans who heard a noise in the bush and thought, “I bet that is a cute little bunny” got eaten by the sabre-toothed tiger. Those who assumed the worst, and ran away to hide, lived to propagate our species. All kidding aside, it is an evolutionary fact that an important part of our survival instinct is to assume the worst. It enables us to avoid situations that might cause us harm.

Assuming the worst does not only apply to our physical surroundings, it also spills over to the assumption of intent. Attribution Theory, developed in the 1950s by Fritz Heider, explains that as humans we are predisposed to attribute intent behind other’s actions. This helps us to make sense of our world. Add this to our instinct to assume the worst, and it explains why when someone does something that did or could negatively affect us, we automatically assume that they did that because they are a bad person. Remember the driver that cut us off in the car? Our initial assumption is not that he didn’t see us, but rather that he did that on purpose because he is a rude and inconsiderate person. I once heard Oprah Winfreyⁱⁱ say that whenever she gets a rude taxi driver, rather than not giving the driver a tip, she doubles the tip hoping that will put them in a better mood for the next passenger. I think we can safely agree that Oprah is an exception to the rule.

Another common psychological theory that helps to explain why the Vacuum Monster exists is self-serving bias. Related to Attribution Theory and our human instincts, self-serving bias is the reason that we see ourselves in the best light possible and attribute the bad stuff to others. It is why my son tells me how brilliant he is when he gets an A on a test and how bad the teacher is when he gets a C. It also explains why in a conflict situation, each side attributes to themselves the moral high ground and sees the other side as the proverbial snake in the grass. Social psychologists call this the Illusion of Moral Superiority (Tappin & MacKay, 2017). “When opposing sides are convinced of their own righteousness,” note Tappin and MacKay, “escalation of violence is more probable.”

Most societies have a fable like the story of the ugly duckling where the baby bird imprints on the wrong mother when it hatches. The other barnyard animals see it as an ugly duckling rather than a cygnet (or a baby swan). In humans, this is called the “speed of classification”. We are imprinted immediately when we meet someone or something new.

We often call these first impressions, and first impressions are, as we know, very hard to change. Classifying or imprinting again is related to our survival mechanism. As humans we classify things in binary fashion: good/bad, dangerous/safe, like/dislike, us/them. This helps us make sense of the world, and our brains do this very quickly. Like the chick that imprints on the first thing it sees upon hatching, human instinct is to make an immediate first impression. We then use that impression to attribute cause and effect. This helps us to make sense of our surroundings and our place in the world. Remember, Maslow's theory of self-actualization and hierarchy of needs tells us that understanding our place in the world is a universal human ambition.

Confirmation bias is the tendency to seek out, interpret, judge and remember information that supports our pre-existing views and ideas. This is also referred to as my-side bias. The National Academy of Science recently published a global study of 376 million Facebook users. The study highlights the important role that confirmation bias and selective exposure plays in reinforcing our world views. The study suggests that this also contributes to our emotional response to polarizing societal issues. Arun Maira, part of India's Founding Fuel,ⁱⁱⁱ describes how this phenomenon is exaggerated by social media. "Social media... force[s] people into self-reinforcing echo chambers, in which people follow who they like and lob hate-bombs across the walls of their echo chambers at people they do not like. It is not designed for thoughtful deliberations, in which people are willing to listen to other points of view. It too quickly and sharply divides people into groups who are for something and those who are against it; into communities of 'people like us' and 'people not like us'."

Knowing that humans immediately classify things in binary fashion also helps us to understand the human aversion to loss. If our brains were wired to seek pleasure above avoiding pain, our species would not have survived. This is why the avoidance of loss is a far greater motivator for people than the opportunity to gain. It also explains why, when something happens that we do not understand, we immediately assume it is going to result in some sort of loss for us. And avoiding loss is our number one priority. Let's go back to the early man who heard the noise in the bush. The one who immediately reacted to avoid loss survived.

Emotion before reason also falls under this same rationale and contributes to our fight or flight instinct. Emotion helps us to attach meaning to the world around us. People make sense of events based on how it made them feel. Human beings do not suspend judgement until we have learned all the facts. Instead, we jump to conclusions based on our emotional response to a situation. We anticipate the reason behind actions and events. We assume intent of those involved. This is why, when we hear the name of a politician, we will often either have a feeling of pride or a visceral feeling of dislike, based on which political side that politician is on. Our feeling will depend on whether he/she is in the "like us" or "not like us" category. This is also why we tend to emotionally fall back on black and white arguments. Especially when we are speaking about issues like the economy, security, human rights, resource development, immigration and privacy. Even though we may understand logically that there is a large grey area, we tend to stick to the black and white zones.

The Vacuum Monster feeds on Attribution Theory, self-serving bias, the speed of classification, the fear of loss and our tendency to use emotion before reason. When there is a

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void of information, each of these behavioural traits contribute to the empty space being filled with negative ideas and assumptions. The Vacuum Monster tips the conflict scale towards destructive outcomes and away from constructive ones. I argue that the power of facilitation can help us to slay the Vacuum Monster—and our weapon of choice in this epic battle is LIGHT.

The Power of Facilitation as Vacuum Monster Slayer

Light energy has amazing qualities. It is a great disinfectant and at the same time an amazing growth agent. Facilitation can help individuals and groups to bring the information that filled the vacuum out into the light. Facilitators can help people to share with each other their individual interpretation of history. Facilitators can help them to explore their assumed intent as to why people acted the way they did. They can then examine what it meant to them and the emotional reaction they felt/feel. Sharing assumptions is often all it takes to create a shared understanding. It can help to remove the “misses”—misinformation, misinterpretation and misconceptions—and to identify a way forward.

“By bringing the information into the light, facilitation has the power to make the invisible visible.”

Take, for example, a child’s dot-to-dot exercise. When there are dots on a page with clues and numbers to guide us, everyone creates the same image. However, if you take away the numbers, clues and context, people may connect the dots differently, drawing their own image or conclusions. Rorschach created a whole genre of psychological tests using this same concept. Add to this the confirmation bias discussed above, and we have much for the Vacuum Monster to feed on. Facilitation has the power to open and hold the space for groups and individuals to share their mental images. It also allows them to share their assumptions, interpretations and emotions around an issue.

One of the most powerful tools that facilitators have to bring information into the light are what I call original questions. Original questions go back to base principles and answer the question “why”. I have three sons and when they were young their favourite word was “why”. When we told them to eat their peas, they asked “why”. When we told them it was time to go to bed, they asked “why”. When their great-grandmother passed away, they asked “why”. Of course, for those of you with children you know that every “why” question is followed by an average of at least three other “why” questions. This is the way children typically make sense of their world. Original questions are the base questions that help us make sense of a situation or issue.

Let’s take an example of a leader who is frustrated about the continuous conflicts happening between departments. If the leader deals with each conflict on the surface (what happened to cause this conflict) immediate fires might be extinguished. But the embers remain and have the potential to reignite or, worse, cause a catastrophic fire that could spread across the entire organization. What the leader needs to do is continue to ask “why” questions until he or she finally gets to the original question— the question that tells her why the conflicts are happening. It takes this child-like curiosity of asking “why” for the

leader to understand not only what is going on, but why it is happening. Only then can she begin to help the departments to work together towards constructive outcomes, rather than destructive ones.

Examples from the Field

I have been asked to help many workplaces and teams who are in situations of extreme conflict to find constructive solutions that will allow the organisation to successfully meet its mission and goals. What I find is that they almost always have in common two conditions/problems. The first I call the Ostrich Syndrome and the second the Broken Camel.

The Ostrich Syndrome is simple: the leadership has had its proverbial head-in-the-sand for a long time. This means they have either ignored or enabled the conflict to remain unresolved for so long that the situation has hit a critical level. They have allowed the conflict to negatively impact the organisation's bottom line and its ability to deliver on mission critical objectives. Less than 18 per cent of managers are reported as being effective at dealing with conflict (Psychometrics Canada Ltd, 2015), which may be one reason for this. Too many leaders and managers ignore conflicts in hopes that they will go away on their own. They hope that people will forget about it and move on. Unfortunately, that rarely happens.

The second condition I refer to as the Broken Camel. We all know the saying, "The straw that broke the camel's back." In most organizations I deal with, the leadership has not only ignored one conflict, but they have ignored or swept under the rug many small conflicts. Over time, the many small conflicts have built up to create a massive problem. In my experience, there is rarely one thing that caused the conflict. It is usually hundreds of unresolved small things that have slowly eroded the team's ability to communicate, trust, solve problems, work together and think together effectively.

In these types of situations, I have adapted the Institute of Cultural Affairs' (ICA) Journey Wall method (see appendix A). We use it to identify significant events or situations that have occurred and have impacted the organization, the team or individual staff members. The staff writes each event on a card and stick the cards on the Journey Wall. The Wall is at least ten metres long, with a date ruler across the top. Today's date is on the far-right hand side and the ruler counts back in time from there. Depending on the organisational history and length of time the staff has been with the organization, the ruler may count back a few months, a year, ten years or longer. In a staff group of 15–20 people, we would typically have 150–200 cards on the wall by the end of a two-hour silent reflection time block. This may sound like a long time, but remember we are dealing with a conflict situation that has evolved or grown over many years.

In the second step of the process, the facilitator engages the team in a dialogue about each card. They discuss what happened, people's different interpretations of what happened. They examine how it made them feel, what assumptions were made and the impact all of that had on themselves and the organization. This can be a very intense and difficult conversation, and requires a facilitator skilled in dealing with highly emotional, often

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divisive dialogues. However, the benefits of this approach are immeasurable! As participants see the value of ‘digging up the old dirt’, they start to say things like, “I had no idea that is what you thought,” “I didn’t realize that was why x happened,” “I wish you had told me that earlier,” and “But I thought you said that because...”

The exercise can take days to complete in highly entrenched conflict situations. But the increase in self-awareness, team awareness, understanding, trust and empathy is worth the time and effort by everyone involved. Shining a light on each of the issues/events allows the team to start to unpack and examine each little straw on the camel. They begin to lighten the load, making it much more manageable. As the facilitator moves participants down the Journey Wall, there is also a great deal of problem solving that takes place. Lists of action items are developed to reverse past mistakes, correct gaps in policies and procedures, document new agreements and commitments, etc.

I have used this process with corporate groups, healthcare teams, educators and community groups and I am ALWAYS amazed at the results. One participant told me after a very long and emotional three days, “This was the most difficult and rewarding three days of my life.” I recently met a manager that was part of a team I worked with more than five years ago and she told me that her staff still refer to the Journey Wall we did and remind each other about the lessons they learned through that process. Her comment was, “Before you helped us move into the light, we were failing on all organisational measures, but since those sessions we have met every organisational target and we have a much happier workplace!”

The most important outcome of any facilitated process designed for groups in conflict is to teach and embed positive communication skills and norms. It enhances the abilities of the group to think together. This is crucial so that the team can deal with future conflicts constructively. It leads to positive outcomes and better relationships. I always preface these types of engagements with the concept that team members do not have to be best friends to be able to work together effectively. They do, however, have to be good colleagues who trust each other’s professionalism. And if I do my job well, I will work myself out of a job!

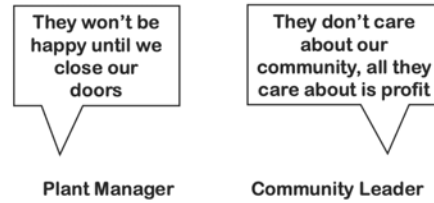
This is what skilled facilitation of a processes, such as the Journey Wall, can create or recreate. When the Vacuum Monster is attacking a team, shine light on the information void and see what you can uncover. You and the team will be amazed at what you find.

The Power of Facilitation in Solving Large Scale Societal Conflicts

The same principles hold true for community conflicts. The power of facilitation can help the parties better understand each other’s point of view. It helps people to appreciate other perspectives and, often for the first time, to begin to truly listen to each other. It is not necessary to agree on every point, but it is critical that the parties understand each other’s beliefs and points of view. Shining a light on the information vacuum will disinfect it of negative assumptions and misinterpretations—at the group level, the organisational level, the community level and the national level.

The Power of Facilitation in Resolving Conflicts

Take for example, a community in conflict with a neighbouring manufacturing plant. Facilitation has the power to create the time and space to hold authentic conversations and to remove assumptions of intent.



Once the parties start to communicate and better understand each other, they will stop seeing the situation as us against them. They will then be able to work together to resolve the issues plaguing them both. It changes the situation from me against you to us against the problem. They will be able to challenge their own assumptions about the intent of the other parties and open their minds to the possibility of working together towards a constructive outcome. When that happens, the facilitator can step back and allow the parties to think together and work towards a common goal. That is the power of facilitation.

There are many examples where the power of facilitation has been used on a large scale to successfully slay the Vacuum Monster, even when it is attacking whole countries. The five examples outlined below, demonstrate how the power of facilitation can help societies in conflict achieve constructive outcomes.

<i>Singapore Conversations</i>	<p>The Singapore Government^{iv} undertook a large-scale, long-term facilitated process to engage their population in dealing with some difficult and divisive public issues. They understood the purpose of public engagement was not to resolve a dispute or solve a problem. They realized that as a government they needed to go out to the people and ask original questions. Their purpose was to gain “a better understanding of what it takes to listen and engage each other on issues close to our hearts.”^{iv} The questions they asked were: “What Future Do We Want?” and “How Do We Get There?”</p> <p>By going back to those original questions, they were able to engage their citizens in authentic conversations about the future of their nation. This allowed them to identify solutions to the issues they were facing together. The process had the added bonus of creating ownership by the general population. The result was not a government action plan but rather a national commitment to do things differently.</p>
<i>Ireland Citizens’ Assembly</i>	<p>The Irish Citizens’ Assembly was an exercise in deliberative democracy. It placed the citizen at the heart of important legal and policy issues facing Ireland (Citizens’ Assembly Fact Sheet, 2018). It included 99 citizens and an appointed Chairperson and ran from 2016–2018. The Assembly deliberated on five issues. Some of the issues were deeply divisive, like abortion and gay marriage. Some were procedural, like how referendums are held. But all were very important to the future of the country. The key principles the Assembly operated under were openness, fairness, equality of voices, efficiency, respect and collegiality.</p> <p>The Assembly was highly successful. It resulted in a national referendum that supported their recommendations. It led to calm and thoughtful debate during and after their deliberations. “<i>It took the debate out of the realm of fearful self-interested calculation,</i>” stated an onlooker. Since the Assembly proceedings were open to the public and media, the exercise led to a better-informed public and lessened the hysteria that often circulates around debates based on dogma.^v</p>

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<p><i>U.S. Citizens’ Juries</i></p>	<p>The Jefferson Centre created the Citizen’s Jury process in 1974. It was designed as a resource-sensitive approach to bring communities together around public issues of concern or conflict. The intent was to give residents the resources and information they need to think critically and create sustainable community solutions. The process utilizes a randomly selected, and demographically balanced, panel of 15–24 citizens who serve as a microcosm of the public. They meet for three to five days, hear from a variety of expert witnesses and then deliberate together on the issue. The result is a set of recommendations for decision makers and the public.</p> <p><i>“The citizens’ jury is an intensely-involving, brain-stretching, eye-opening, educational experience. Every single session was a scary, emotional, wonderful experience that left me with my mind spinning, my heart pounding and a new life-changing thought process. I wish everyone could experience a process like a citizens’ jury and really live democracy in action.”</i> - Participant in the 2009 Citizen Jury on Election Recounts.^{vi}</p>
<p><i>Taiwan Imagines</i></p>	<p>In 2006, political scandals dominated the news in Taiwan, depressing the nation’s spirits. Personal and collective ideals became replaced with the thought: ‘Were we wrong to hope?’ The Imagine Taiwan dialogues served as a collective learning arena where individual citizens’ capacity for understanding and accepting each other was exercised and expanded.</p> <p>Organizers believed that simply broadening the discussion would be a peace-building incubator. It was an exercise in true listening and respect and recognized the innate diversity of life in general and Taiwan in particular. <i>“When we experience responsibility as a freedom, instead of a burden, we are awakened to the diverse possibilities of our lives.”</i>^{vii} Imagine Taiwan events promoted dialogue where imagining the future was contextualised in the present moment realities. One participant commented at the end of a session, <i>“Before I came here, I didn’t know what I can talk about, the theme seemed too big, but at the end we have seven actions. It’s amazing!”</i> And another wrote, <i>“It feels really good to know I am not the only one who loves Taiwan.”</i></p>
<p><i>The People’s Verdict - Canada</i></p>	<p>In 1991, Canada was in the middle of a constitutional crisis that was splitting the nation. A consortium of national media organizations gathered twelve average Canadians who were led through an intense facilitated process by Getting to Yes author Roger Fisher.</p> <p>The result was the People’s Accord, which was supported overwhelmingly by the general population. <i>“Amazingly, these ordinary citizens succeeded in their mission—despite the fact that they’d never really listened to the viewpoints and experiences of others so unlike themselves [before]...and despite the tremendous time pressure (they had two-and-a-half days to develop a consensus vision for Canada)...and despite being continuously watched by a camera crew. Their vision was published in four pages of fine print—part of the 40 pages Maclean’s devoted to describing their efforts in the July 1, 1991 issue headlined The People’s Verdict.”</i>^{viii}</p>

There are four elements that each of these inspiring international examples have in common:

1. Each created the time and space to shine light in the vacuum. They allowed the participants to poke around, explore and discuss what they saw. They allowed people to examine the issues, the evidence and remove assumptions and misinformation.
2. Each was built on the belief of the innate wisdom of the group. They believed that the wisest choices are made when all voices are heard. They knew that no problem is unsolvable and made no conversation off-limits.
3. Each reverted to the base principles and asked the original question— WHY. They allowed participants to explore their ideas and better understand others' ideas rather than just jumping into debating the resolution or answer;
4. Each framed the exercise as a dialogue designed to resolve an issue. They did not frame the conversation around choices or finding a solution to a predefined problem.

These examples remind us that there is no problem so big that a group of people cannot solve it. They also demonstrate the importance of time, space and process, and the willingness to consider issues with a child-like curiosity and genuine inquisitiveness. The power of facilitation is based on the belief that people have the innate ability to understand, think through and resolve issues. Facilitation can help solve large-scale and deeply entrenched problems. It harnesses basic human ingenuity and provides an avenue for it to thrive, even in times of deep conflict. Facilitation enables us to think together.

“Without difficulties, life would be like a stream without rocks and curves—about as interesting as concrete. Without problems, there can be no personal growth, no group achievement, no progress for humanity. But what matters about problems is what one does with them.”

**The Te of Piglet
by Benjamin Hoff**

Conclusion

This chapter focused on the power of facilitation as an enabler of positive public dialogues and critical conversations and as a tool to use when piloting conflicting parties to a sustainable resolution. This is not a new concept—we are not reinventing the wheel here. As mentioned earlier in this chapter, and in the other chapters in this book, discussing issues through various forms of open conversation has been how our species has evolved. Dialogue and deliberation may be new wording, but the concept is ancient—when you have a problem, talk it out and don't stop talking until the problem is resolved to everyone's satisfaction. But somewhere along the way, in our collective race to be better, faster and stronger, we have forgotten this most basic of concepts.

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Facilitation is a process that helps us to remember how to talk it out or, as Peter Senge says, think together. Facilitators spend years, lifetimes even, perfecting the art of helping individuals, groups, teams, communities and societies recall and employ that most basic of skills. The power of facilitation is that it provides the time, the space and the processes to guide people through the reactivation process of remembering how to ask original questions. It helps us to hold genuine dialogues, even about issues about which we have very deep and conflicting feelings or beliefs.

The Vacuum Monster is indiscriminate; it will attack individuals, groups, teams and nations.

Facilitation has the power to help us to embrace the notion of constructive conflict—moving from “beat and defeat” to “together we can”. So, the next time you are faced with a conflict, grab your nearest facilitator, or take on the role yourself, and slay that vacuum monster. Help to shine light on the information, allow people to talk it out and foster the can-do attitude that has helped mankind to evolve and thrive through millennia.

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CONFLICTS ARE NORMAL, BUT MANY OF US VIEW THEM AS DESTRUCTIVE WITH A "BEAT AND DEFEAT" APPROACH.

LIKE A VACUUM MONSTER, CONFLICT HAPPENS WHEN THERE IS AN EMPTY SPACE VOID OF INFORMATION.

OUR CONFLICT RESPONSES ARE RELATED TO:

EVOLUTIONARY THEORY	Our assumption of the worst
ATTRIBUTION THEORY	Our predisposition to assume others' intent
SELF-SERVING BIAS	Seeing ourselves differently from others
BINARY CLASSIFICATION	Our tendency and speed of classification
CONFIRMATION BIAS	Our desire to seek out reinforcement of our own views and ideas
	Our fear of loss
	Our emotions response before reasoning

THE VACUUM MONSTER FEEDS ON THESE BEHAVIOURS.

THERE ARE TWO COMMON CONDITIONS ASSOCIATED WITH CONFLICTS - THE OSTRICH SYNDROME & THE BROKEN CAMEL

THE POWER OF FACILITATION SLAYS THE VACUUM MONSTER BY SHINING LIGHT ON IT, MAKING THE INVISIBLE VISIBLE!

THERE ARE 4 COMMON ELEMENTS IN THE 5 INTERNATIONAL EXAMPLES

- CREATE THE TIME & SPACE TO SHINE LIGHT - IN THE VACUUM
- FRAME THE PROCESS AS A DIALOGUE
- ASK THE ORIGINAL QUESTION
- BELIEVE IN THE WISDOM OF THE GROUP

THE power of facilitation

ENABLES

POSITIVE DIALOGUES

THINKING TOGETHER

MOVING FROM

BEAT & DEFEAT

TO

Together we can

@rosanna_acf

Visual summary by Rosanna von Sacken



Chapter 5

The Power Of Facilitation For Team Development

Héctor Villarreal Lozoya

Group facilitation generates conditions similar to the behaviours, social context and practices of high-performance teams. What we mean is that fruitful collaboration can occur even in new groups or low performing groups. Through these experiences, the members of the group can see the window of possibility of what they can achieve and what can happen if they transform into a team. In regular conditions it takes a long time to develop these behaviours. Or it requires a significant change in the behaviour of the leader or time to implement.

“Teamwork is the ability to work together toward a common vision. The ability to direct individual accomplishments toward organisational objectives. It is the fuel that allows common people to attain uncommon results.”

Andrew Carnegie

By reading this chapter, team members, leaders and facilitators in general will be able to discover how the power of facilitation impacts the development of a group, how it accelerates its performance and establishes a path for the groups' evolution into a team.

Some people might say that you can't expect much of a new group, in terms of results or efficiency. I'd say that assessment is generally correct, unless the group engages in effective group process facilitation practices led by an experienced facilitator.

Humans as Social Beings

In the last fifty years, plenty of media sources, business books and social media have focused on the individual as the source of creation, development and progress. As if one person in isolation can bring about phenomenal change. But, if we look closer, it is our capability of coming together and becoming a cohesive social group that has enabled human progress in all areas. We are indeed social animals.ⁱ

Anthropologists have concluded that one of the two main reasons Homo sapiens were able to surpass other species was the capability to act together. In the early dawn of humanity, it was cooperation that allowed one group to establish dominance above others.

“It is the long history of humankind (and animal kind, too) that those who learned to collaborate and improvise most effectively have prevailed.”

Charles Darwin

Even when compared with other social animals, humans are especially cooperative,ⁱⁱ sometimes even referred to as the ultra-social animal.ⁱⁱⁱ

From religion to education, from economy to technology, it is this capability to organise ourselves, define roles, establish goals and work in the company of others that has made the difference. It has enabled human-kind to be the predominant species on planet

Earth. We go as far as needing cooperation to reproduce and take care of our offspring. We can say cooperation is ingrained in our DNA. “We eat better when we work together,” the saying goes, and there’s a lot of truth in it.

As a society, we enshrine specific individuals as heroes in our collective road of advancement. Encyclopaedias are full of examples. Yet, it is the incredible capability of human groups to come together, that truly advanced the creation of civilizations across the ages. Chapter 9 explores further our collaborative nature.

Nevertheless, results vary tremendously from group to group. Even within the same organization, groups working under similar if not identical conditions can have significant variation in performance.

Nowadays, it is common to hear that when people come together in a meeting, they often end up frustrated. Participants get tired and leave in a worse emotional and relational state than before they started. Attendees need a meeting to follow-up on and debrief the ineffectual meeting. It so happens that even a word has been coined for this phenomenon: “meetingitis”. The Urban Dictionary^{iv} defines it as when an organization or individual has so many meetings that completing actual work is near to impossible.

Why did all this happen? Aren’t we social by nature? Aren’t we most effective when we work together? What’s the cause of all this frustration?

I believe that the complexity of today’s society and the incomplete tools we are given in our traditional education system deter collaboration. Our attachment to old habits and work structures limits the capability of most groups to work together effectively.

Here is where the power of facilitation can make a difference. Facilitation takes into account the necessary variables to make group collaboration a success. From preparation to method selection, energy use to conflict resolution, facilitation has the power to oversee the socio-emotional aspects of the group members. It can also manage the information flux needed to solve an issue or complete a decision-making process.

It is the facilitator’s job to aid the team to arrive at the best result possible with the resources at hand and in the available time. This includes opening the communication channels between the participants, allowing the flow of ideas, better acceptance of action plans and increasing consensus. This, in turn, provides higher quality results, while maintaining or even improving relationships.^v

From Groups to Teams, from the Gate to the Goalpost

We have established that being in a group comes naturally to us as human beings. Reviewing some of the literature about social groups it is clear that human groups are not necessarily equal in their performance, development or output.^{vi} Some groups have developed certain behaviours that have made them much more effective and efficient. All of this while maintaining social cohesiveness. Several authors identify these groups as an evolved state with a new name: a team.

I like to think of these differences in behaviours, values and attitudes of the members of groups and teams as part of a continuum in the evolutionary process of a group. On one side of the spectrum you have a group. A group has a very basic reason for the individuals to be together and gather or may be that its members have just started to interact with one another other. As the relations between the members and the agreed-upon conduct of the group improves, the transformation starts, and the group moves to the right of the continuum, increasing its achievements and results.



From Groups to Teams

For example, let's take a group of airline passengers ready to board at the airport's gate. They all have the same goal: arrive at their destination. The performance of the group is based on an accumulation of individual goals, similar to "I want to arrive at a specific city." Besides that, the relationships between its members, their goal of "how to get there" could be quite different.

Let's compare this with a Football World Cup champion squad. A team considered by many to be the epitome of a high-performance team. Its 23 members have an overall goal of winning the tournament. Their individual goals may be quite different—forwards focus on scoring goals, defenders on stopping the attackers and the goalie to maintain its net undefeated. It is their relationships, training and communications that allow them to become victorious.

As Kimberly Bain has often told me, many authors/theorists equate the natural evolution of groups into teams as a linear process, which only requires time and effort to be accomplished. However, not all groups that spend a considerable amount of time together actually become what is generally considered an effective team.

At any given time, a group might be moving to the right or left of this continuum. This will change depending on how they express their values of collaboration, respect and balance between an individual and the group. In a team this translates into specific behaviours:

active listening, planning, focused discussions, follow-through, conflict management, decision-making and consensus.

Tuckman's Model

Back in 1965, Bruce W. Tuckman produced a relatively short research article.^{vii} This article, just 15 pages long, had a tremendous impact on how we see the development of groups. The Tuckman Model is also better known as the "Forming-Storming-Norming-Performing Model". Over the years, it has provided the basis for evaluating the development/maturity of a team for several methodologies. It has also served as a basis for many leadership development programmes.^{viii}

In a quick summary, the different stages establish a critical path groups typically go through. This development process is not always linear. Tuckman suggests that sometimes groups can go from Stage 1 to Stage 3 without having to go through Stage 2.

The stages identified by Tuckman's Model are:^{ix}

Stage 1 - Forming: At this stage, members are not fully familiar with the situation. The leader or person in charge has noticeable power and makes use of it. At this stage, members of the group meet together and directed by the leader, they identify the team's objectives and their own goals and tasks.

I think we can all relate to the words of Gene Kranz, former NASA Flight Director, at the start of his career when he wrote, "I found it difficult to believe that the people in my building were the core of the team that would put an American in space. For the first time in my life I felt lost, unqualified, but no one sensed my confusion. Then I thought, maybe they feel just like me." (Kranz, 2000). Many members of a team can feel like this at the beginning of a journey with a new team.

Stage 2 - Storming: Conflicts arise due to different work styles, unclear tasks/roles and personal backgrounds. Here is where clashes and conflicts happen. For example, a team member challenges the authority of the leader, or the group members experiencing stress due to lack of roles and clear authority lines. Usually, if the problems in this phase are not resolved, the team (or its performance) dies with it. The arguments that arise here can make the unit stronger if addressed properly. Groups may continue at this stage for a very long time when issues are not resolved.

Stage 3 - Norming: Conflict management and socialization help resolve differences and allow people to work together. This stage often overlaps with storming because new tasks can affect behaviour. Groups that emerged from the Storming phase would have developed intimacy and common responsibility towards its goals. Norms in a group change all the time, new processes as well as updated guidelines, policies and responsibilities need to be established. This commitment to the common goals allows the team to face any issues, even the most difficult ones and agree on new courses of actions.

"There is no feeling in the world to compare with the feeling you get when you know you

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blew it, and you have to explain in excruciating detail during simulation debriefing why you acted as you did. There are no excuses,” explained Gene Kranz, about their internal review processes when learnings are internalized, new processes thought of and the new norms were established in order to get the first manned crew to the moon.

Stage 4 - Performing: This is where the team attains success through hard work and deep knowledge. Work results are visible, as the relationships and rules of work have been internalized by the members of the group. The leader can concentrate on team development and improving performance. Tuckman proposes that the highest-performing teams are the ones that self-organize, without needing a leader to organize the tasks, responsibilities and rules for them. The leaders’ intrusion may use energy and resources inefficiently. Traditionally, leaders are further away from the issues than the members of the team.

Again, Gene Kranz summarizes this in his experience at NASA, *“There are times when an organization orchestrates events so perfectly that the members perform in perfect harmony. It is part of team chemistry, where communication becomes virtually intuitive, with teams marching to a cadence, the tempo increasing hourly and the members never missing a beat.”*^x Then he adds, *“...you simply had to have trust in your crew, your team and in yourself. Through trust you reach a place where you can exploit opportunities, respond to failures, and make every second count.”*

“If everyone is moving forward together, then success takes care of itself.”

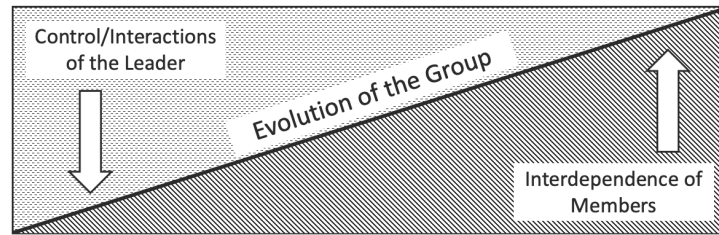
Henry Ford

Stage 5 - Adjourning: Teams made for projects dissolve after achieving their goals. This stage was created by Tuckman and Jensen almost a decade after the original model was published.^{xi} Some authors identify that this stage can also be an “adjusting” stage. Smith states that when critical changes happen to the group, it impacts it in a fundamental way. Some examples are new leadership, new goals or significant process changes.^{xii}

At the end of this chapter, I share how a facilitator or team leader can manage these stages and expedite movement towards the performing stage.

It is important to understand, however, that some teams may not move beyond a certain stage. Groups can get stuck, for example, in the Storming stage, in which the team still is in the process of managing internal conflict and dissent. This could provoke an environment of low motivation within the team. A lack of results can increase the conflict as well. All of this may result in the need to change the team members or the team leader.

One of Tuckman’s novel ideas was that when the team arrives at the performing stage, the role and interactions by the leader are reduced. This happens as team members increase their interdependence. Interdependence allows the members of the group to solve the issues between them instead of having the leader step in every time. This allows a freer flow of information, quicker decision-making and, in the end, better results.

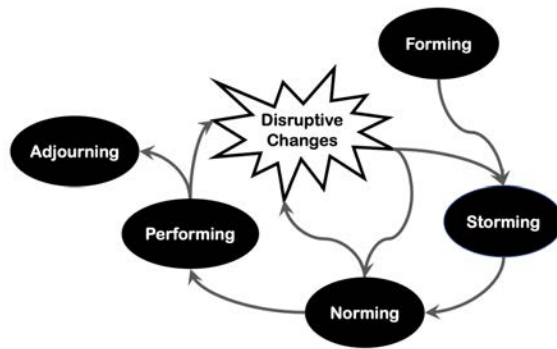


Leader Interactions and Members' Interdependence

We can see striking similarities in the characteristics Tuckman^{xiii} presents with some of the core components of what is generally considered good process facilitation.

The Evolution of the Group

While the model has continually stood the test of time, Smith proposes that instead of just an upward-evolving process, the model needs to be viewed as a series of cycles. The group might encounter situations, which increases the stress in the group (new members, new goals, new leaders, etc.), thus impacting its performance. He states that a new Storming stage happens in the life cycle of the group that needs to be sorted out through a new Norming stage.



We can interpret this evolution of the group in a graphical way as a continuous evolutionary cycle.

For example, if the group is performing at a high level for a considerable amount of time and a change of leadership happens (that reason itself could be a source of disruption as well). If the team is small, let's say a team leader with two or three reporting staff, then

most certainly a Forming stage can be identified, new relationships need to be established and uncertainty needs to be clarified. Possibly different rules will be implemented by the new leader and new processes will be agreed upon.

If the team was high performing, the staff members could already operate with a great degree of liberty. The group could thus go to Norming directly, as one of the scenarios that Tuckman envisioned. This will depend greatly on the personality and leadership style of the incoming manager within the social context of the group.

However, if the performing team has a considerable number of members, it is a whole different scenario. Normally, large performing groups have defined and structured internal processes. They have well-established relationships as well. If the new leader is selected

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from within the team, it is possible that the change will be less disruptive, and the group will only go through a new Norming phase unless, an internal struggle for the leadership position fractures the group into a Storming phase. Any of these scenarios can benefit from facilitation processes. Facilitated agreements can smooth out the transitions. That

is one of the ways that the power of facilitation manifests in creating better teams.

“The facilitator ensures the goal is shared, the rules are obeyed, the structure is followed, the power is shared, and the results are committed to.”

As we have shared, all these changes take time to occur in the normal evolutionary process of a group. Facilitation can disrupt this cycle altogether and, accelerate it in a significant manner.

It doesn't matter which stage the group is in. It may be that the group is an ad-hoc one, meaning that it has been brought together for one occasion (Forming stage). The group may have some internal issues that haven't yet been clarified (Storming stage). It might even be producing very good results (Performing stage).

The *power of facilitation* provides a springboard and acts as a catalyst to transform groups into teams in a short period of time. A facilitator will take this into account when designing the process. The facilitator will ensure the processes are at the level needed, so the group can perform as a unit during the engagement. The facilitator ensures the goal is shared, the rules are obeyed, the structure is followed, the power is shared, and the results are committed to.

The facilitator aims to move the group into the performing stage as soon as possible, making an efficient use of the limited time available. The facilitation intervention may not transform the behaviours permanently though. It will transform them just enough to get the work done if it was appropriately designed and effectively executed.

In many ways, good facilitation practices also coincide with Google's findings in their research on high-performing teams. In 2015, Rozovsky^{xiv} shared that Google found that there are five key dynamics that set successful teams apart from other teams:

- Psychological safety
- Dependability
- Structure and clarity
- Meaning of work
- Impact of work

A good facilitated process supports all these elements, thus ensuring optimal conditions for the group to perform.

Teams Good - Meetings Bad

In order to do their work, teams need to gather. Team gatherings are generally called meetings (although in Keith's Taxonomy of Meeting^{xv} you can find more than two dozen other words for it). In the last decade, the backlash against meetings in social and business media has grown exponentially. A quick online search shows that meetings have a very bad reputation.

“The strength of the team is each individual member. The strength of each member is the team.”

Phil Jackson

It is not uncommon to hear participants complain about having to attend “yet another meeting”, not having any time to actually get some work done. In several surveys, participants share that in quite a few occasions they are not clear on why they meet. Regular meetings usually fail in this regard, according to several studies.^{xvi}

When an organization hires a professional facilitator, it aims not only to have a “great experience” or a “marvellous corporate retreat”, but to get specific tangible results out of the time and effort invested by the participants.

Facilitated meetings at their core are “deliverable-specific”. It means there is a very well-defined outcome expected from the meeting. The facilitator may plan one or several group sessions in which he will guide the process, allowing the participants to arrive to the deliverable they consider is the best option to go forward with. So, there is quite some work to be done prior to the participants coming together.

The *power of facilitation* can transform a group of strangers, or sometimes even individuals with a certain degree of mutual dislike, into a team. It can take a diverse group of participants and turn them into a cohesive unit focused on specific and carefully designed tasks.

“Effective meetings don't happen by accident; they happen by design.”

Andrew Carnegie

I believe this is a critical differentiator of a professional group process facilitator from other experts. It understands that human groups can be quite complex by their very nature and proper preparation and session design as stated in the International Association of Facilitators Core Competences³ is fundamental for a successful facilitated meeting.

Transforming a group into an effective team during a session does not happen by chance; it happens through careful design. Below, you can see some similarities between behaviours of high performing teams and successfully facilitated meetings.

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<i>Common behaviours of high performing teams and professionally facilitated meetings</i>
<i>Norms and roles are established and followed by all (leaders and regular members)</i>
<i>Focus on achieving goals and a clear sense of purpose</i>
<i>Motivated members</i>
<i>Decision-making can be flexible in its process</i>
<i>Dissent expected, allowed and appropriately managed</i>
<i>High percentage of success (achieving of stated goals)</i>
<i>Quality of interaction matters more than who is in the group/meeting</i>
<i>Communication channels are open and there is a clear intent to listen to others and clarify what is being said</i>
<i>Participation is shared and interdependence is key</i>
<i>High trust in others in regard to the task and the feedback</i>

The Facilitator as a Catalyst for the Group/Team

The facilitator aids the group without being a part of it. He focuses on the process the group is going through, so the participants can focus on the content. The facilitator aims to remain “neutral”, meaning that she does not take sides on the discussion and does not manipulate it to arrive at a certain conclusion. However, the facilitator does have the means to “push/pull” the group to arrive at where group members have agreed and to fulfil the objectives of the session.

The facilitator is the process leader, not the team leader. This allows the participant to trust in the process, by trusting the abilities of the facilitator to guide their deliberations in a way that achieves their objectives.

This balance between performance (task focus) and participation (group engagement/satisfaction) is the critical aspect that provides much of the power to the facilitator to help transform the group into a team. Being an external participant in the content, the facilitator can protect the meeting process, or at least control some of the complications that can be seen in the Storming and Norming stages of group development.

If we think about it, the facilitator has to help the team go through the “Forming-Storming-Norming-Performing” process quickly and efficiently to achieve the desired results in the desired time frame. To understand how a facilitator does this, we can equate the facilitator as a catalyst.

“Great things in business are never done by one person. They’re done by a team of people.”

Steve Jobs

A catalyst accelerates what could take much more time in a regular environment. As a catalyst, the facilitator changes the way participants interact with each other and with their leader (or leaders). It even

impacts their normal day-to-day rules and behaviours. Facilitation increases the speed of interactions, idea generation and collaboration.

Case study: The Consulting Company

Several years ago, a multinational consulting company hired me to support their annual corporate congress. They had been doing the event every year for the last five years but had never hired a facilitator. The company had over forty offices. A core team from seven offices was responsible for the congress, making all major decisions, including setting the agenda.

Past agendas basically assigned time slots to discussions in an open forum and included issues that related to all offices or case studies of services delivered the previous year. However, previous years' participants complained that engagement was low, and nothing was achieved at the congress. Participation in the congress was declining, with less than 15 offices participating in the previous year. The goal of this year's organizing committee was to turn the congress around. They told me they wanted to increase participation and engagement.

From the beginning, during the planning interviews with the core team offices, it was recognized that this needed to be a radically different event. We began by agreeing to and documenting their aims, both relationally and in terms of deliverables. It was agreed that the main goals would be improving relationships and information exchange. They wanted to transform the perception of the participating offices.

By utilizing planned facilitated processes during the congress, participants changed how they saw and supported each other. Several months after, some of the participants mentioned it was a pivotal point. Now they could actually reach out to the other offices as they knew what the other countries could offer them not only in terms of know-how and expertise, but they also felt confident enough to exchange ideas and possibilities.

They went from the Storming to Norming stage during the congress. After the rules and processes were agreed upon and were used, they moved to the Performing stage. They improved the knowledge flow between the different offices significantly. They did this by opening direct communication channels and by acting like a high performing team. The company continued to hire a facilitator every year to help plan and facilitate their congress. That's the power of facilitation!

Case Study: The Hospital Directors Cabinet

Another example that comes to mind is when I was requested to work with the team of Directors of a hospital with over 300 beds in the Caribbean. They realized that they needed a facilitator to help them define their Mission and Vision Statement as a team.

The team included the hospital director and the senior management team. The members were quite varied. There were doctors and nurses, pharmacists and engineers, accountants

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and administrators—each one with his or her unique point of view of how the hospital needed to be run.

During a half-day engagement, the team aimed to reflect and define their reason of existence and their vision for the hospital. As the discussions progressed, they realized some of their processes for exchanging information were not aligned with their Mission. They then decided to invest the remaining time of the session to redesign their own processes to help this exchange.

What happened was that they invested time in clarifying the best procedures that could help them think better together. For them this was mind-opening, as they realized their boring mid-week meetings could transform into a forum with the capacity to move ideas and initiatives forward.

I had a chance to observe the team meetings before and after the engagement. Their monthly review changed tremendously. What was once a dreaded task, became an energetic review of the programmes and initiatives happening across the whole organization. In individual conversations, they shared that they had realized that their own internal processes as a team had to be updated continuously to be effective. This is also the power of facilitation.

The Power of Facilitation on Group Trust and Team Building

Common team-building engagements tend to focus most of the time on the “soft” side of skills development. It usually aims to “increase communication” among its members. Goals for this type of activities tend to use descriptors such as: create connections, generate trust and improve relations between team members. We can relate them to Tuckman’s Model in many of its stages.^{xvii}

In contrast, in a facilitated environment, the members of the group do not necessarily have to trust each other prior to the meeting (although it helps plenty for a good process). It is the facilitator who needs the participants to trust him or her, so they can trust the process that has been designed. Being a foreign entity to the group, sometimes it is easier for the participant to trust the facilitator than the “guy from the other department” because of past history and its relations. So, in a way, the facilitator becomes a repository of the trust capacity of the group. And as we’ve read before, trust (Google calls it dependability) is a critical element for group performance.

It is during this process that conversations, when conducted in an open and receptive manner, can become the seed for a longer term improvement of the relationship. This in itself has the potential to transform the group. As Tuckman established, it is the quality of the relationships between the members of the group that makes its communication and decision-making effective. The more and better the trusting relationships, the higher the performance of the group.

It is not uncommon after a facilitated session to hear expressions from the participants

such as, “I would have never thought that Mr. Z could be so interesting to work with.” Or “Ms. Y definitely brought some new ideas to the table.” This can spark a whole series of initiatives after the facilitated session is over.

Engaging the Power of Facilitation for Team Development

When preparing for a facilitated session, the facilitator and the team leader/ manager/ sponsor need to understand where the group is in terms of its development stages (Forming-Storming-Norming-Performing-Adjourning). This can be the key to a successful design and can have a lasting impact on the development of the team.

Let’s take the case of a new group with representatives from different stakeholder sub-groups. Here the facilitator needs to invest enough time in the Forming-Storming phases. This is to ensure there is enough trust to really get deep in the conversation to achieve the required outcomes.

On the other hand, if the group is already in the Performing stage, investing time to go through a Forming phase during the session could even be counterproductive. I’ve heard a term used in such cases as “over-facilitating”, when a facilitator interrupts the flow and energy of the group.

Once you understand where the group is you can design your session and timings in accordance to the group’s maturity and define how much effort is needed to go through each of the stages to achieve performance.

Conclusion

In this chapter, we have seen how facilitation has the power to transform the relations between group members. The facilitator can accelerate the development of a group by creating the appropriate conditions and designing processes needed to optimise group performance.

Properly utilized, facilitation has the power to expand the capabilities of the group. During a facilitated session, group members practise behaviours that help the group evolve from the Storming or Norming stage into Performing. Behaviours such as active listening, respecting everyone’s points of view or adhering to a set of rules for meetings and decision-making which are all critical for a group to improve performance.

In the end, facilitation can bring about one of the most powerful effects in human relationships: build trust among the members of the group. As Warren Bennis said: “Trust is the lubrication that makes it possible for organizations to work.”

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Recommendations for Facilitators

(A Mini-Appendix)

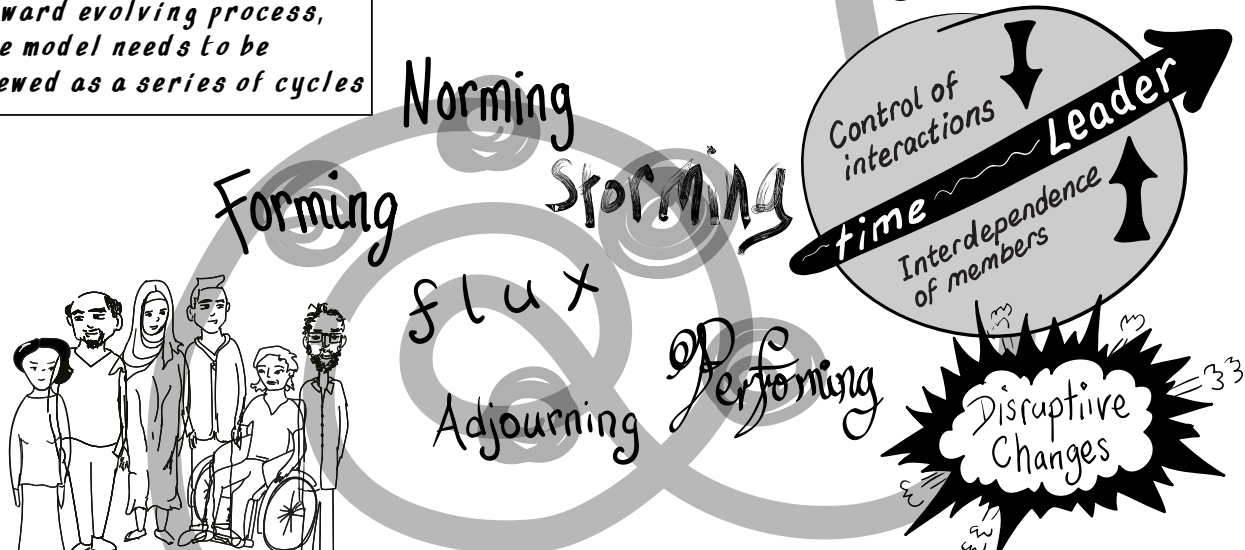
Notes and recommendations for facilitators on what to look for and do when designing a facilitated session.

<i>Stage</i>	<i>What to look for to identify the stage</i>	<i>What to do – Strategies for your facilitated session</i>
Forming	<p>People could know each other poorly or have no opinion of the others at all. Most participants are positive and polite. Some anxiety might be visible. Team roles might not be clear. The goal of the engagement might not be clear to all the participants.</p>	<ul style="list-style-type: none"> • Icebreakers are designed for this stage, but don't overdo it. • Ensure the team gets to know each other, why they are there, what are the goals and deliverables expected. • Group ground rules are critical, allow the team to design most of them. • Ensure building of trust among members. This is a make-or-break stage as the motivations will be channelled here for the rest of the session. • Open conversations of individual expectations are needed at this point.
Storming	<p>Conflict is visible between group members; some may show signs of frustration. Roles might need clarifying. Processes could be ineffective or downright confusing. People may complain about workload. Be on the lookout for personality clashes. There could be a trend of avoiding conflict.</p>	<ul style="list-style-type: none"> • It is critical for you as a facilitator to earn the group's trust, as some distrust might exist among participants. • Conflict management skills are gold if the group has been stuck here for some time. • Define the processes to generate consensus and to how conflict is going to be managed. • Prior interviews with the participants can help uncover hidden agendas that would support the process to unlock positions during the session.
Norming	<p>Members understand the processes and identify the strengths of their colleagues and even provide constructive feedback. However, some stress might show as it can overlap with the previous phase. If a new task, project or product is the expected outcome, it can create new conflicts, devolving the group into the Storming phase.</p>	<ul style="list-style-type: none"> • Ensure the group understand where it is in terms of the task, focusing on the positives, having a good consensus technique at hand can be key to move the process forward. • If there are individuals that don't feel comfortable, provide them with conflict management techniques so they can try and solve the issues themselves. • If the deliverable of the session is to establish a process or agree on a way of work, ensure the participants define proper communication channels (technologies, content, frequency, etc.) and decision-making methods
Performing	<p>Members of the team feel quite comfortable with their roles, their colleagues and the processes they work with. Their performance is ongoing.</p>	<ul style="list-style-type: none"> • Get them to work on the issue quickly, don't over-facilitate. Provide them with the tasks, the time and instructions and let them perform.
Adjourning	<p>When a group ends either because of changes in the structure, goals or resources, might generate lots of stress in its members.</p>	<ul style="list-style-type: none"> • Help the team to celebrate achievements or gain proper closure. Support the members toward the future so they can allow themselves to see the opportunities the future might bring. • Ensure recognition is properly done when needed. • It is important to manage the emotions at the end of a process; it is not only about the deliverables. • Retrospective exercises are helpful to summarize learnings. • An ideal adjourning will include lessons learned about the internal group dynamics that were impacted/transformed during the session. This can support for the group to "import" behaviours or practices from the facilitated session into the daily life of the group.

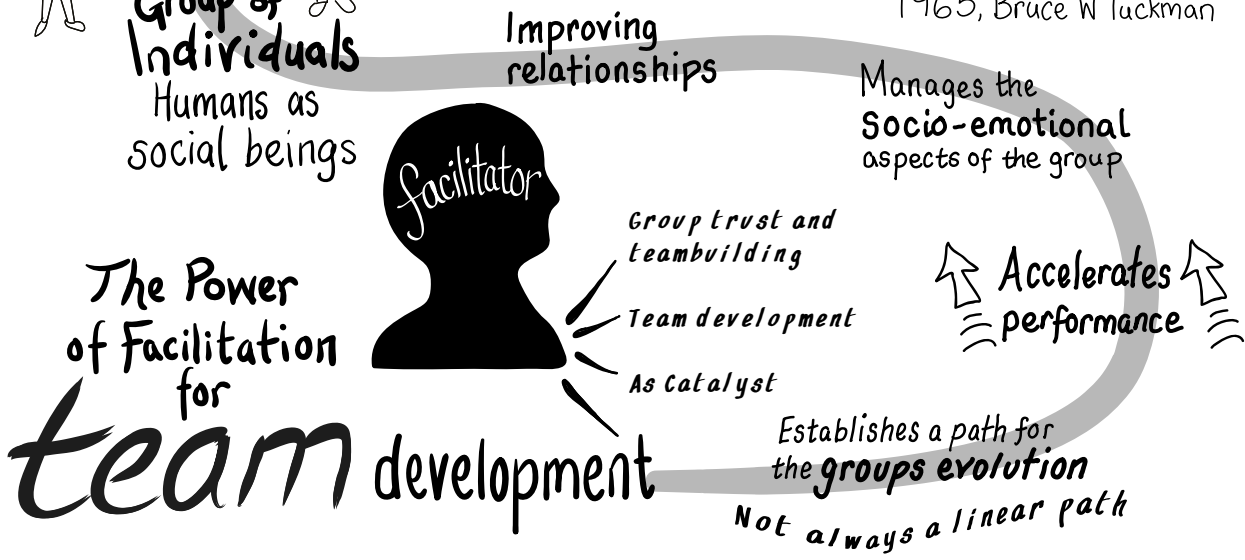


2005, Smith, instead of just upward evolving process, the model needs to be viewed as a series of cycles

High Performing Team



1965, Bruce W Tuckman



Visual summary by Debbie Roberts

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Chapter 6

The Power of Partnership Between Facilitation and Communication

By Martin Gilbraith & Michael Ambjorn

“We needed to bring our 120 staff together—for a celebration, but also to prepare for the future. The project had been passed around the organization. Finally, we took it on in the Communications Team. Still, many people were sceptical, saying that they we’re not going to go... And yet, we delivered a huge (multi-award-winning) success.

What made the difference? We brought in external help—and we used the power of facilitation to bring our communications and engagement strategy to life. We were able to take storytelling in the organization to the next level. People felt enabled to tell their own story: past, present and future. And we’re still talking about it today. We should do it again.” — Joanna Anstey on #ETF20.

Why Facilitation is Essential to the Communication Professional and Vice Versa

In this chapter, we explore the *power of facilitation* as applied to the field of professional communication — and to a lesser extent also the power of professional communication practice as applied to facilitation. We believe there is a unique opportunity to apply these professional skills and competencies in partnership with each other. We will share stories of leaders who are doing just that, in their practices, in different parts of the world. We will share a set of case studies illustrating the power of combining these professional approaches, including some practical ideas that you can put to use immediately. Our hope is, in line with the introduction to the book, to reduce misinterpretations, miscommunications and misunderstandings and show the power of collaboration.

*“Listen! Listen to learn.
Listen to be amazed. If
you’re not learning, if you’re
not feeling amazed—or at
least perplexed—you’re not
listening. Curiosity matters.”*

Ginger D. Homan

We hope at the end that you’ll join Kasha Dougall, one of the communications professionals we interviewed, in saying: “I can’t complete parts of my job without calling upon

the services of a facilitator”—or perhaps you’ll decide that you’d like to be that facilitator!

We’ve included insights from over twenty international practitioners we talked to as part of the research for this chapter. Some of them also shared favourite quotes from a range of writers and thinkers, and we’ve interspersed some of these too.

Like many ideas in this book, we see this chapter as the beginning of a conversation, not the end—a learning journey. We encourage you to use the concepts we discuss as an opportunity to strike up a conversation with others about the power of facilitation in communications and engagement. In our experience communicating with others, through conversations, is the fastest way to deepen knowledge, create connection and enhance collaboration.

The Frameworks in Which We Work

What sets professions apart from other endeavours, arguably, is that they apply a consistent approach to the challenges that fall within their fields of expertise.

To the outsider, the cornerstone of professional practice is trust. It is the reason why people hire or engage other people. You trust that the accountant will do the sums accurately, that

“I am always surprised about the huge difference in the quality of reflections and dialogue a skilled facilitator makes. I attend many meetings every day and many with little results because of unclear objectives, poor meeting facilitation and lack of clear conclusions.”

Pelle Nilsson

the doctor will diagnose diligently, and so on. Yet, different professional bodies use different terminologies to describe their competencies.

The International Association of Facilitators (IAF) has a well-defined competency framework. This helps to guide professionals as they go about their work—helping clients—through the practice of facilitation.ⁱ

The International Association of Business Communicators (IABC) the Global Standard of the Communication Profession, where a set of principles are articulated—against which professionals can test their competence.ⁱⁱ

The Power of Partnership

To help demonstrate the power of partnership, we’ll use six practical examples to illustrate the power of facilitation in professional communications— one for each of the two constants and four principles of the IABC’s Global Standard also sometimes referred as #ECCASE:

1. **Ethics:** How might you tackle a tricky challenge using the Power of Facilitation and the Focus Conversation method?

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2. **Consistency:** Is consistency the key to award-winning work?
3. **Context:** Why it matters – from the boardroom to the frontline.
4. **Analysis:** Can a big picture help you avoid analysis paralysis?
5. **Strategy:** What is a strategy horizon and how can it help your organization?
6. **Engagement:** How might you create engagement that matters?

Like with a good cookbook, don't try all the recipes at once. Rather, dip in and out of this section for best results. Each idea is shared to help spark ideas and conversations. If you come up with new insights and examples, be sure to share using the #FacPower hashtag.

1. Ethics: How Might You Tackle a Tricky Challenge?

“Communication professionals adopt the highest standards of professional behaviour.” - The IABC Global Standard

Ethics is the first constant in professional communication practice.

A code of ethics is a practical tool to help guide your professional practice. Both IAF and IABC have codes that are short and to the point—and which their members commit to uphold. Both are easy to find with a simple web search, or look for the links in the resource section at the end of the chapter.

We'll focus here on how you can bring these alive in your own practice. That is because, while codes are useful on paper, they become really powerful when they're taken into conversation. It is through questioning that real-life ethical dilemmas can be explored and negotiated.

“Organizations tend to ignore or marginalize people who ask questions. They are labelled as not being team players.”

Ruth Steinholtz

There's a tension within this idea though, which might come as a surprise to some facilitators who make a living working with questions! Communications professionals may be reluctant to approach this type of dialogue as they are often trained as spokespeople. An approach very different to facilitation. Why might this be? We spoke to an international expert on ethical business practice, Ruth Steinholtz (and incidentally one of our clients), about this. And as she observed:

“Organizations tend to ignore or marginalize people who ask questions. They are labelled as not being team players.”

You too might have found that yourself if you asked one question too many at an inopportune moment.

This is where the power of facilitation truly comes into play—because asking questions is the very essence of facilitation and allows groups to explore their answers for mutual benefit.

Here are some of the questions Steinholtz (and her co-author Professor Chris Hodges OBE) recommends for leaders wanting to implement ethical business practice:

- Have we defined the essential ethical purpose of our organization?
- Have we defined and consistently championed ethical values?
- Do our systems result in the right people being “on the bus” and in the right jobs?
- Are our leaders and board members able to challenge each other and hold each other to account?

Great questions. But they could be daunting, and difficult to answer (and ask), without some conversation to contextualize them. Being able to handle ethics is at the very core of the practice of both professions—in fact, for any profession. One way to help navigate those hard conversations is a proven technique known as the ‘ToP’ Focused Conversation method, built on a model of human behaviour known as ORID for short, reminding you of each stage of the process; Objective, Reflective, Interpretive, Decisional.

It is an integral part of the Institute of Cultural Affairs’ Technology of Participation (ToP) methodology, and it is described in Appendix A where you can also find more resources for exploring ethics and ethical dilemmas.

2. Consistency: The Key to Award-Winning Work?

“Acting as the organization’s voice, a communication professional expresses a single, consistent story for internal and external audiences.” - The IABC Global Standard

After Ethics, the other constant in professional communication practice is that tools and techniques—and narratives—are applied consistently.

As Ron Fuchs told us when we spoke to him: “Comms has to be consistent and constant to work”. As he also pointed out “People often think that they can communicate once, and they’re done”.

In this section, we’ll look at the power of facilitation in the context of consistent practice. You may be sceptically thinking, “Doesn’t that conflict with the mantras about ‘change’ being the name of the game, and that in facilitation every intervention must be tailored to its particular context?”

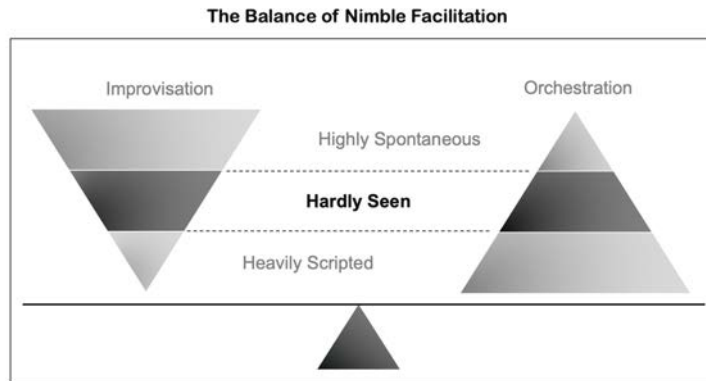
To be clear, by consistency we’re not talking about what in outdated communication practice was called “cascading”—where a uniform message was expected to be repeated through the layers of the organization. See the reading list at the end for a useful book about this, titled *From Cascade to Conversation* by Katie Macaulay.

‘Change is the only constant’ sounds of-the-moment, but it is in fact an assertion from Heraclitus of Ephesus, made some 2,500 years ago. More recently, you might have come across the Cluetrain Manifestoⁱⁱⁱ (and the Agile Manifesto^{iv})—and again, you might be surprised how old they are too (relatively speaking).

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So, what can facilitation offer in this context? Rebecca Sutherns, in her facilitation guide, *Nimble: Off Script But Still On Track*, has a useful model which speaks to this balance between orchestration and improvisation. She writes:

“Masterful facilitation is actually invisible. Done well, people hardly notice facilitation—they’re just carried along, willingly and productively. They have found that sweet spot, where orchestration and improvisation offset each other beautifully.”



According to the IAF competency framework, a facilitator must be able to “create appropriate designs to achieve intended outcomes” and also “adapt processes to changing situations and needs of the group”. This relates to the balance of orchestration and improvisation that Rebecca refers to as Nimble facilitation.

“Comms people plan, plan, plan. Facilitators are sometimes perceived as relying on improvisation/letting go of the playbook, but ultimately planning and improvisation are two sides of the same thing.”

Charlotte Ditlöv Jensen

What does nimble (yet consistent) communication look like? The first requirement is a clear organisational strategy that the communications can be aligned to. And then tools such as brand guidelines, tone of voice and values can be used to keep the delivery consistent yet flexible.

“To dare is to lose one’s footing momentarily. Not to dare is to lose oneself.”

Søren Kierkegaard

Ultimately, in both professions, it is about the consistent application of the principles and frameworks available. Indeed, it is the path to award-winning work. Work that is well-structured, yet vibrant. We’ve included links to some of the relevant award programs at the end.

3. Context: Why it Matters, from the Boardroom to the Frontline

“Advocating successfully for the organization [also] depends on a thorough understanding of its political, economic, social, technological, environmental and legal context—and of how to interact with representatives of other organizations.” - The IABC Global Standard

With the constants of Ethics and Consistency covered, we can now turn to the four principles of the IABC Global Standard, which help communications professionals address each challenge they come across. The first is context.

Why use facilitation for this? As Katrine Kent told us: “It can bring out the best in people—and the context people are in—when it relates to a vision, goal or other desired outcome.” Moreover, contextual analysis is often based on desk research, which can lead to siloed thinking. A facilitated participatory process, in contrast, enables you to learn from diverse viewpoints and gain unexpected insights. A few examples of facilitated participatory processes are Participatory Horizon Scanning and the ToP Historical Scan (or Wall of Wonder).

The following are two examples of how participatory approaches to understanding context helped one small and one large organization explore the context of their challenges and situation, in order to illustrate the power of facilitation in understanding context.

A Small Group: Mindapples

The board of Mindapples, a charity that helps people manage their mind, wanted to recalibrate their strategy. In order to understand the current operating context, we adapted the traditional ToP Horizon Scan - borrowing elements from the Historical Scan methodology.

“We gained clarity about our goals and objectives and developed concrete action points to take the charity forward.” - Richard Armes, Mindapples board member.

A Larger Group: European Training Foundation (ETF) #ETF20

In the first stage of a two-and-a-half-hour session, twelve groups of ten were invited to brainstorm and share memorable events and milestones in the twenty-year history of ETF and anticipate future events as well. Events were brainstormed and stories were shared at the personal and world level, as well as at the level of ETF itself, and written on cards and plotted on a timeline on the 10m “sticky wall” at the front of the room. Participants drew on

“We used the power of facilitation to bring our communications and engagement strategy to life.”

Jo Anstey #ETF20

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their collected artefacts and mementoes for inspiration, and plotted photographs alongside their cards—creating a visual history which helped the group think about their work in a new context.

For the second stage of the session, new groups shared some of the stories that they had told and heard, and more, and began to discern impacts between levels and trends over time. Finally, the twelve tables shared stories and insights with each other in plenary, culminating in suggestions for what name to give to their shared journey of over twenty years. Stories and insights were captured in a publication^v and a video^{vi} was made to communicate the spirit of the day.

4. Analysis: How a Big Picture Can Help You Avoid Analysis Paralysis

“With rigour and discipline, a communication professional identifies opportunities and challenges both inside and outside of the organization.” - The IABC Global Standard

With context covered, we can now turn to more in-depth analysis before getting on with devising a communication strategy. Analysis is the fourth principle of the IABC Global Standard. Fortune favours the prepared, or as Ron Fuchs told us: “Dig as deep as you can into the business: your success is driven by your ability to understand the organization.”

Case Study: Big Picture

We talked to Mike Pounsford about his experience of bringing leaders from different organizations together for analysis. It illustrates how a visual approach to facilitation can help a group out of analysis paralysis. He told us the traditional top-down approach is hopelessly inadequate, especially in large organizations. He also said a cascade approach is too slow—in both directions—when there are multiple levels of management and a complex organisational structure. “Top-down” also contradicts the message that an organization needs to empower their people to take more responsibility for the delivery of satisfaction and productivity.

Achieving the kind of collaboration needed across an organization puts a premium on quality conversations—conversations that help people work out how they can support strategic direction. The kind of conversation that encourages people to challenge, work out what they need to do to support change, and feel a high degree of ownership of the outcomes.

In order to combat analysis paralysis, Mike invited the group to explore developments in technology that would affect their business in the next five years. First, using ICA’s Technology of Participation (ToP) Consensus Workshop method, they grouped their answers into seven main themes. He then invited the group to draw these themes in a picture, using their insights and imagination to create a visual synthesis in real time.

This gave the organization a visual representation to their challenge, and what the organization needed to do to navigate change. To involve people in a conversation about how to respond to these challenges, such a visual approach provides an engaging starting point because:

- It invites people to interpret what is going on.
- It is easier to access (you do not need to understand jargon like “paradigm shift”).
- It provides information more quickly.
- It leads to a less critical and more curious audience (lists invite a more critical, sceptical response).

What is more important than the visual are the conversations around it, and they must be well facilitated. The visual becomes the focus for a conversation whereas questions draw people out. Using the ToP facilitation approach and visual thinking tools such as Big Pictures, Mike found

“If you wish to communicate effectively and to influence others, you would need to understand them first. And understanding can only come from listening.”

Stephen Covey

he could create the kind of collaboration needed to achieve a deeper analysis—which could then help people to actionable insights. This is essential for good strategy in general and also good communications strategy to support it.

5. Strategy: What is a Strategy Horizon and How Can It Help You Test Your Communications Strategy?

“Addressing communication challenges and opportunities with a thoughtful strategy allows the organization to achieve its mission and goals.” - The IABC Global Standard

Strategy is the fifth principle of the IABC Global Standard. And it is a broad, deep and timeless topic. Lawrence Freedman, in his commanding volume, *Strategy: A History* explores the topic across some 768 pages. And elsewhere in this book Kimberly Bain has managed to cram lots of practical insights and actionable advice around strategy into less than a dozen pages.

Leaders in IABC will already be familiar with participative approaches to strategy development. The last two 3-year strategy cycles have made good use of many of the methodologies we’ve mentioned in this chapter. And this has helped the organization involve, and give voice to, even more of its 1,000+ leaders across the world. A powerful way of creating partnership and aligning intent with action.

Communications strategy is certainly different from other strategies, but it is also just a strategy. One that has to fit within and align to the organisational strategy. Which is also why broad input is so crucial to its success. Constructive input from stakeholders can help prevent many a mishap. It is about creating clarity. And agreeing (and aligning) the next

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steps, so that many people can put a shoulder to the wheel. And we believe a facilitative approach will beat a solo endeavour every time.

So here we'll keep it short: focus on testing your communication strategy—and how it connects back to the higher level organization strategy. We encourage you to read Kimberly's chapter and Freedman's book as well as the works of Miyamoto Susashi, Sun Tzu and Von Clausewitzch and the rest of the classics. And some of the more modern takes by Christensen, Collins, Kagermann, Kaplan, Norton, Porter, Porras, Powers and Bill Staples of ICA.

Meanwhile, we also provide you with a few questions that can help you test your communications strategy. They're probably a little bit different than what you might be used to, but that's the point we're getting at. Open dialogue can help minimize miscommunication, especially when formulating a communications strategy. It could be called a meta-activity.

Testing Your Communications Strategy by Casting an Eye Towards the Horizon

A good communications strategy works at multiple levels, and across time. The two-axis Strategy Development Horizons model plots activity levels against time frames and identifies questions you may want to consider. ⁵

In case this exercise throws up more questions than answers, it might be time to do a deeper dive with your communications colleagues. We've used the Focused Conversation format referenced earlier in the chapter with a range of clients. And using this two-axis approach to explore strategic horizons never fails to reveal new insights, whether we are working with a corporate, public sector or non-profit organization.

Fig. Strategy Development Horizons



Our preferred methodology for developing strategy is Participatory Strategic Planning from the ToP toolset, detailed in Bill Staples's Transformational Strategy: Facilitation of ToP Participatory Strategic Planning. This is a powerful and versatile long-range planning process, which incorporates the ToP Consensus Workshop method for building consensus and the ToP Focused Conversation method for effective group communication, and an action planning process for turning ideas into productive action and concrete accomplishments.

“If I had an hour to solve a problem, I'd spend 55 minutes thinking about the problem and five minutes thinking about solutions.”

Albert Einstein

How to do communication strategy is beyond the scope of this chapter. What we're proposing is that you may be able to broaden, deepen and clarify your communication strategy development/approach with the help of facilitative processes.

6. Engagement: How to Make it Matter

“A communication professional identifies and communicates with employees, customers, shareholders, regulators, government agencies and other groups with an interest in the organization's activities. All these groups have the potential to change the organization's results.” - The IABC Global Standard

This final principle of the IABC Global Standard underpins our argument—that the power of facilitation should be central to the work of communication professionals. It is both an objective to work towards, and something you do as you prepare.

As Kimberly Bain reminded us in the writing of this chapter: “Engagement is a collective group of purposeful conversations. It all starts with conversations, but those conversations must be intentional, purposeful.”

If you get everybody involved as you go along, the implementation is more likely to happen organically. Kotter says in his book *The Heart of Change*: “Never underestimate the power of clever people to help others see the possibilities, to help them generate a feeling of faith, and to change behaviour.”

In other words, the short answer to the strategic challenge: ‘What does it take for people to align behind change?’ is...engagement. What does that mean in practice though?

During a past International Facilitation Week we brought together sixty nine facilitation, communications and change management professionals to explore this in a Twitter chat “#FacWeekChat”. And here we'll outline the six top tips that were shared in response.

Our aim was to bring people together to connect with and learn from each other on a topic of mutual interest, and also to make connections and foster broader collaboration. Our experience of change included local and international work with large and small organizations in a variety of sectors and industries, including health, education, IT, faith and international aid and development.

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What does it take for people to align behind change?

1. **The context must be conducive.** People align behind change. *“When external pressures have made the need for change evident.” “The facilitator as midwife can only help a client that is already pregnant!”*
2. **High level vision and goals, and ideally values as well, must be clear and shared.** Alignment happens when there is *“a clear purpose... before a decision on what to do, a focus on energy and momentum for change”*.
3. **There must be inclusive and authentic participation.** *“Holistic participation in co-creating vision is the key to create buy in.” “Co-design, co-creation, collaboration.” “Convene all with a stake in change.” “Everyone wants change, but no one wants to be changed.”* Alignment does not happen *“when people forget that changes requires the involvement of others”* or *“when change is imposed from above without proper consultation or facilitation.”*
4. **Humility, patience and deep listening is required.** *“Be honest and transparent about the challenges that will be faced, otherwise when failure happens you lose people’s trust.” “Take time, constant process checks, take time, listen, take time, acknowledge resistance (did I mention take time?).” “Come to terms with the antibodies in the system and talk candidly about them.” “Pay as much attention to the intangibles amongst people as to what is explicitly being said.”*
5. **Be open to what needs to emerge, while remaining focused on the vision.** *“Start with possibilities rather than a project plan”* and *“be aware of groups’ emerging needs...[allow] the group synergy to flow.”* Alignment did not happen *“when people didn’t respond to emerging needs, and when personal issues took precedence over common vision”*.
6. **Nevertheless, leadership must also be clear, decisive and inspiring.** *“Be a leader that makes tough decisions. The notion of change is disruptive, but strong leadership can mitigate people-risk.”* Make a *“powerful invitation, expressed openly with integrity”*. *“Discussions about change are so often negative, that is, about failure. We need to inspire people, enable them.”*

Conclusion: What can we learn from each other?

A lot, it turns out. We’ve drawn on insights from a range of international practitioners, inter-profession dialogues and case studies from both large and small organizations.

What can communication professionals learn from facilitation?

If you want to bring people with you, you have to involve others, and facilitation is a great way to do that. Facilitation can help transform communications “from cascade to conversation” and communication professionals can learn from facilitators about how

to structure conversations once people are engaged. Communication professionals can use the many collaborative processes from facilitation to better prepare for that moment.

As Ginger Homan said:

“Comms people sometimes think they know the answer. Facilitators, on the other hand, always know they don’t know the answers.” “As a consultant [working across both] I know the answers are in the heads of the people I work with—not mine. It is about building questions— and peeling away layers—it is exciting and inspiring when you get to the key insights.”

What can facilitators learn from communications professionals?

Our emphasis in this chapter has been largely on how communication professionals can benefit from applying the power of facilitation in their work. Facilitators also have much to learn from their colleagues in the communication profession.

For example, communication tools and skills are key to getting people “in the room” for facilitation, well informed and with appropriate expectations. They can also help to engage all those who will never be “in the room”...and to communicate the results. Communication professionals are also skilled and experienced in the good use of data-gathering tools, ways to measure or evaluate the outcomes of engagement work and how to draw out stories as they relate to the task at hand and use these stories for sense making.

And as set out above, we can benefit from each other’s professional standards and competency models. Yes, it can seem complex at first (maybe even complicated). Despair not. There is help at hand. Strike up a conversation. Put the power of facilitation to work for you. It can help you make change. And it can be surprisingly fun.

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Visual summary by Chitra Chandrashekar



Chapter 7

The Power of Facilitation for Self-Reflection, Change and Personal Growth

Barbara MacKay

Facilitation is something we do for groups. The same processes we use as facilitators are valuable for individuals. Self-facilitation requires an ability to reflect and honestly look at your life and your patterns. It is the art of taking yourself on a journey.

In this chapter, we will look at:

- What is self-reflection and self-facilitation?
- Why do it?
- How do you do it?
- And what might happen if you regularly tap into the power of facilitated processes to self-assess and change yourself?

It is a very practical chapter. We explore three facilitator planning processes for you to try. There are many other facilitation activities you can use—I am just giving you a taste. My hope is that you try at least one of them. The *power of facilitation* is available to you to create positive personal change.

What is self-reflection and self-facilitation?

A 2017 article by Süleyman Davut Göker and Kıvanç Bozkuşⁱ (paraphrased) says that reflection is not only a personal process but a collaborative one. It involves uncertainty along with experience. We involve more perspectives, values, experiences, beliefs and the larger context. Through reflection, we gain new-found clarity to make changes. New questions naturally arise, and the process spirals onwards.

Coaches, trainers and facilitators invite participants to undertake the process of reflection regularly. Jim Moran wrote a chapter on Cognitive Neuroscience of Self-Reflection.ⁱⁱ He says, “Thinking about ourselves is a cognitive process fundamental to human mental life.” This author says there is an entire brain network somewhat dedicated to self-reflection.

My own experience of self-reflection is that it is a process of analysis, looking honestly at facts and feelings. It is the ability to ask oneself questions such as: What just happened? What did I actually do and say? What did I observe in myself and others? What appeared to go well and not so well? What would I like to be different the next time? What are my next steps? This ability to self-assess accurately leads to adapting and changing. This allows us to encounter future events with more confidence and resilience.

Coach Jim Knight sums it up: “When we reflect, we can look back at something such as a behaviour, assess how we did, and then think about how we can do better based on what we’ve learned through reflection.”ⁱⁱⁱ

Self-facilitation is about applying tools and attitudes that process facilitators use, to reach new goals, decisions and outcomes in our own lives. It is as easy as that.

Why self-facilitate?

Many have heard of the quote: “Before you help others, you must first help yourself.”^{iv} The classic aeroplane instruction of always putting on your own oxygen mask before you help others put on their masks is a good example of this. If you are literally gasping for air, it is difficult to be effective in helping someone else put on their mask. I extend this thought to the field of facilitation. This chapter is about “putting on your own oxygen mask first”. Facilitating your own growth and development can help you be more masterful in facilitating others. I explain more below.

One thing a process facilitator aims to do is to help a group reach an end goal, product, decision, or resolution in a calm manner. Imagine that you are a facilitator who has not mastered the art of reaching a decision for yourself. Essentially, you do not know where you are going. You run from thing to thing. You are lost in confusion. Your boundaries are not clear. You say “yes” to too many requests. This inner state of not knowing who you are and where you are going often impacts the groups you facilitate. In the end, they may feel lost and unfocused.

Another unhelpful pattern that can arise when you have not done enough of your own inner work is operating out of urgency. I have ample experience with this. The only result for me has been burnout, exhaustion and a complete inability to help others or myself. I thought I was impressing others or meeting the inexhaustible list of tasks. In reality, I was not achieving the real impact I could have. I wish I had discovered the power of self-facilitation earlier in my life.

Who is self-facilitation for?

- Anyone interested in growing into a more fulfilling and purposeful life.
- Leaders who want to further develop a vision and encourage their teams to think big.

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- Process facilitators keen to facilitate others through complex change.
- Coaches helping others grow in their skills and ability to think of the big picture.
- Disenfranchised people who need affirmation that their dreams can be realised.

What are my assumptions?

- Everyone can imagine a different and better future.
- It is worth taking two to eight hours on a regular basis to create a compelling and profound plan or time line that will guide and motivate you for many years.
- Creative, intuitive thinking^v and use of imagery typically increase the power of self-facilitation.
- You first want to use these methods on yourself. Then, you can help others use them.

Jesse's Story - Part 1

I was co-leading a workshop and the group was composed of peer facilitators at a facilitators' conference. The purpose of our session was to help people grow themselves as community leaders and facilitators. We used a number of self-reflection exercises throughout the day.

Thirty minutes after everyone had introduced themselves and good energy had been established, Jesse entered the room. Jesse was not a facilitator. (I am going to use the pronoun "they" for Jesse to safeguard their identity.) I asked this person to introduce themselves using the same questions that we had asked everyone else.

Jesse launched into a lengthy discourse about how they didn't really want to be at the conference. The only reason they had come was to get professional development credits. They thought facilitators did a bunch a "woo-woo" stuff (that is, abstract, not useful things) and nobody was ever real. The world was a nasty place and full of bad people. And their job every day was to deal with some of those bad people. They had to be the person who forced them to comply with things they should be doing. They also said they didn't feel well and had taken significant medication to deal with an infection. Finally, they said they had some family issues going on. I tried unsuccessfully to interrupt this person. Jesse continued to rant about how bad the world was, how bad people were, and it was their job to fix everyone. Jesse was not reflective, just feeling really dissatisfied with life and letting us know it without censoring anything.

My co-facilitator told me later that she felt the pain of this person very deeply and at that moment could not think about anything other than their pain. I was noticing that the participants were literally leaning away from this person. Their bodies were bending over as though trying to protect themselves and their faces were looking nervous,

frustrated or scared.

I sensed that this person, given the world they lived in, needed directness. Self-facilitation also needs to be direct and real. You need to be totally honest with yourself. So, I honestly told Jesse what I had just observed in the group. Jesse became quiet and looked a bit surprised but stayed in the room. This intervention was one of many that day that seemed to help Jesse take their change process seriously. We, the co-facilitators and the group had no idea how capable Jesse was of using the process of self-facilitation.

As we share more, keep Jesse in mind. We will come back to their story. Perhaps your life or career journey could change a lot too after reading this and other chapters of this book.

How do you start the journey of self-facilitation?

I would like to help you use the power of self-facilitation through three creative facilitation tools. All of them use images. All of them include visioning. Self-facilitation does not have to include visioning. It might just be a retrospective process—looking back to see what you could have improved from past efforts. I, however, find the most dramatic and fulfilling changes occur when I DO include visioning as a regular life activity.

I have used these three tools multiple times for decades with myself, friends, family and colleagues. Using these tools has dramatically and positively changed my life and the life of many others. The only proof I have is in their words and actions. And there is a bonus if you are a leader or on the leadership journey. I say this because the power of self-facilitation is that, done on a regular basis, it will likely deepen your understanding of yourself and others immeasurably and allow you to lead more effectively.

Jesse's Story Part II

In hindsight, I think Jesse had lost sight of their vision—they did not know their dream. They were executing the “how” but had lost sight of the “why” and the “what”. Let's see what happens when they connected to the why and the what.

See also: Simon Sinek's Golden Circle^{vi}

Three favourite self-facilitation tools

I am only including the three that I think I can explain well in this chapter. Another favourite is the ICA ToP® Strategic Planning model but it requires in-depth training to do well.

- 1. Collage Visioning and ToP® Focused Conversation method.** Collage is a process of taking many images and pasting them onto a board or stiff paper. ToP® (Technology of Participation) refers to a suite of culturally sensitive tools developed

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for facilitators and facilitative leaders around the globe. The ORID or Focused Conversation structure is the foundation on which all the ToP® tools are based.

2. **PATH (Planning Alternative Tomorrows with Hope) graphic facilitation method.** This is a graphic vision and goal-setting process developed by several Canadians originally for people with developmental difficulties to help them lead richer lives. It then was found to be useful for any group or individual.
3. **Grove Graphic Personal Compass Action Planning Workbook.** Grove Consultants is an international visual facilitation company, which produces beautiful process-oriented templates. Facilitators use larger templates with groups. Individuals use the smaller versions themselves. The company also offers training workshops.

Each tool section will cover:

- Why and when to do this, including a few surprising examples of outcomes you can expect.
- What are the steps in the method to help you determine if it appeals to you.
- Preparation, supplies and resources outlining not only props that are helpful but how to create optimal conditions through careful emotional and physical preparation steps.

In case you are wondering which one to try first, the table below may help you decide.

<i>Comparison of Three Self-Facilitation Methods</i>					
<i>Method</i>	<i>Preparation</i>	<i>Time</i>	<i>Skills/ Attitude Needed</i>	<i>Uses Guided Daydreaming</i>	<i>When to Use</i>
Collage and Conversation	Gather 20–40 images	2–3 hours	A willingness to try something different	No	You have no or few ideas about your future. Your brain needs a jump-start.
PATH	Learn the process steps or have it facilitated for you	3–4 hours	Able to visualize, set broad goals, and think through details	Yes	You are highly motivated to make big changes in your life. You need help now and quickly.

Grove Compass Workbook	Buy the workbook; follow instructions. Gather multiple colours of fine tipped markers	6–12 hours, best done over several sessions	Analytical and creative thinking	No	You like to work slowly and methodically and enjoy lots of personal reflection time. You work well with visual templates.
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The Collage and ToP® Focused Conversation method

Why and when do you do this?

I would use this method when you are not sure about your future. It might feel like you have NO ideas about your preferred future. You may even feel “stuck”, unsatisfied, unmotivated and unsure about your current life. You can use the collage method followed with a reflective conversation to get your brain jump-started. The collage method is effective because:

- The pattern amongst the images may tell you something without your conscious mind realizing it.
- The power of images remains with you— neuroscience tells us they get stored in your long-term memory.
- It takes relatively little time and no money.

Jesse’s Story Part III

I saw the power of images with Jesse too. Remember this person’s negativity? Later in the workshop, we asked everyone to first draw an image that represented what their current life felt like. Then we had them imagine/sense a different, more positive future. Jesse proudly showed a drawing of their current state versus future state. With Jesse’s drawing, the contrast was amazing. Jesse had drawn storm clouds and erratic heart palpitations as their current life situation. Their future situation was illustrated by a beautiful mixture of curly designs, with a flower and a sun radiating out in the middle. The difference in tone and feeling between the two drawings was truly remarkable.

My Story

I have used collage multiple times in my life. I have done it alone. However, it is much more interesting if you are with a group of people each working on your own collage. Others may offer suggestions and comments to you which can be helpful along the way. You may observe what others do and copy how they do it.

One time, I cut out a picture of a room with a glass, two-sided fireplace. I literally had

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never seen one of these fireplaces. Yet during our search for a home in a new country, my jaw dropped when I walked in the house with our real estate agent. It had a two-sided glass fireplace. I knew then this must be our future home.

I have also done a joint collage with my spouse of how we wanted our future life to be. We each started with our own section of the same collage.

I sensed we needed to first start thinking about our lives as independent, unique humans. We had left the centre part of the collage for areas where we wanted to be interdependent and collaborative. After a short time passed, the collage took on a life of its own where we had both moved from making the collage about our own desires into one where we were interdependent and partnered. We started seeing many areas of the collage where our lives and tastes were blending together. My spouse had initially been somewhat sceptical about doing this process. His strength is typically in more analytical thinking processes. Yet, as I look at this collage we made over a decade ago, so many things have come true. Today, we are leading a more satisfying and collaborative partnership of walking through life together.

What is the method?

Collage is the simple art of finding images that are compelling to you. You then glue these cropped photos onto a stiff board or paper and work until the entire board is covered with photos. The intent of this type of collage is to portray your desired future. This method should cost little to no money. You could also do it entirely virtually but the tactile feeling of cutting paper may appeal to you more.

Steps:

- Ask yourself this question: What would I like to see, feel and hear in my ideal future 1–10 years from now?
- You choose the time-frame. Sit quietly with that question for a minute or two. Decide on the relevant time-frame.
- Open your storage file of photos and images. Pick out any images that “appeal” to you. You need to not over-think this. Quickly rip out pages or grab virtual images and words that currently resonate positively with you.
- Go through your stack of chosen images and neatly crop or trim the piece you most want. For instance, it might be a single word or phrase from the page or the image or part of the image that most appeals to you. It might just be a colour. Once you have lots of images—more than 30—throw out all the scrap paper or unchosen images.
- Begin gluing or arranging the images on your board, paper or virtual file. You might save the middle of the collage area for an important image. You might paste images and words “organically” (that is, without any sense of order) and see what emerges. You can create sections such as my body, my adventures, my family life, my work life, my travel, etc. Add glitter, etc., if you wish.

- Some people like to have big spaces between sections or photos. And others like me, put all the photos overlapping. You can also cut out or draw words.
- At some point you will feel it is complete. Set it aside and revisit it later.
- If you are doing a physical collage, cover the entire board/ paper with the collage glue for a more permanent and shiny finish.
- Print it (if virtual) and hang it up on a wall and admire it for at least ten minutes.

Preparation and Supplies (if doing a physical collage)

- Magazines work well. I also use postcards or print off photos or images from the Internet when I don't have access to magazines. Libraries and retirement centres are likely to have magazines they are willing to throw out. Pixabay ^{viii} is a free online source of photos. This may take a few days or months to collect them. Store them so they are easy to access. Print off anything that is electronic. You can crop them later.
- Find card stock or poster board. I recommend at least ½ metre by ½ metre (15" x 15"). It can be round, rectangular or square. You want it big enough to hang somewhere where you can see it but not so big that there is no place to put it.
- Use 3-D materials for effect. You can use glitter, sequins or shiny paper also. There is no limit to what you can do.
- Have some glue sticks or gloss acrylic medium ready to paste your images on the board.
- Have a garbage can nearby to throw out any images/clippings you discard.
- Invite a few colleagues or others to join you in doing the same if that would be helpful to you.
- Find an hour or two of quiet time.
- Tell yourself it will go well. Imagine yourself enjoying it.
- Put on some music that you like.

The day you complete the collage, conduct this conversation with yourself or invite someone else to ask these questions of you. Note that these questions are sequenced and written in the form of a ToP® Focused Conversation Method. You can find out more in about this method in Appendix A.

- What do you notice in the collage? Colours, shapes, words, emphasis, etc.?
- What particular images stand out the most?

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- If there are words in your collage, what words do you really like?
- What is the tone and feel of this collage for you? What is surprising? Exciting? Confusing?
- Which piece/theme in this collage seems particularly important to you?
- What are some things you are already doing to make this vision come true?
- Who would you like to show this collage to?
- If you were to capture the “feel” for this collage in a phrase, what would you call it? (It might be a movie or song name, a phrase from a poem you like, or just a phrase that sums it up nicely).

Options

What if you just want to work on one specific future aspect of your life or work? You could decide to give your collage a specific theme. For example, I wanted to get a sense of how to design my garden and tore out photos of flowers and designs from garden magazines that I liked. When I saw them all together on a collage, I sensed the “mood” of a garden that most appealed to me.

If you are working on a relationship shift or new relationship, you might focus on that. Or, only focus on your work life or next career vision theme. Based on my experience, I prefer to include both my personal and work life in a single collage. The personal side of life affects and influences my work life, and vice versa. Try it for yourself. However, for your context, the single theme approach might work well.

After you complete your collage...

It helps to look at your collage often for several weeks. This will instill the images into your long-term memory. It will inform your choices when opportunities come your way or decision-making is needed. Your vision will invite you to take positive future-oriented actions. Can you keep rehearsing the vision in your mind? If you do, the power of the images tend to propel you forward.

The PATH (Planning Alternative Tomorrows with Hope^{ix}) graphic facilitation method

Why and when do you do this?

When you have a half day, this short and powerful graphic planning process is excellent for you to begin a project or explore a new life/work direction. This exercise motivates and focuses you for 12–24 months. It also works very well for couples or families. This method is effective because it:

- builds clarity and identifies support for your deepest desires.

- synergises disparate and disconnected ideas.
- kick-starts a project or a program that has stalled.
- motivates future actions for months/years into the future.

It works well because you are motivated to seek clarity about what your life has in store for you. Your unconscious mind seems to know what it wants for you but cannot quite access it without the right conditions and processes.

What is the method?

This process was developed by Jack Pearpoint, John O'Brien and Marsha Forrest in 1994, based on their earlier model called MAPS. It was originally developed as a person-centred planning process designed to “level the playing field” for people with disabilities. This process allows them to co-plan ways forward with their own network of community/support. It is now used by anyone. There are eight steps noted below.

Steps:

1. Touching the Dream – the “North Star” (this I do as a guided visualization)
2. Sensing the Positive and Possible 12–18-Month Goals
3. Grounding in the Now
4. Identifying People to Enroll
5. Recognizing Ways to Build Strength
6. Charting Action for the Next 2–3 Months
7. Planning the Next Month's Work
8. Committing to the First Step

I've done a video* to show you the steps and there are others on YouTube.

One caveat, a very important one, is you must first have your own PATH done (ideally by a trained PATH facilitator) before you can do the PATH for others. Please honour this guideline. Since so few people in the world are able to offer this service to others, we wanted to make it more accessible. It is a fantastic gift to do this and then pass it on to others.

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Jesse's Story Part IV

Jesse was stuck in Step 3 (The Now) to some extent. They could see good points of their life (the money) and bad points (they had to work with people they “disliked”, and whose values they did not agree with). When Jesse worked in our workshop, they had a chance to reflect on their dream. And this unlocked the goals they wanted to achieve—more time and adventure with family, better health, hanging out with positive people, leading a simpler life. Jesse moved quickly to steps 4–8 and left the workshop having defined a catalytic first step. Jesse announced they were going to pass on a key aspect of the daily work to someone else. This aspect of the work was the most disheartening for them. Once Jesse decided this, we could see their whole face beam with contentment and relaxedness. Their intended actions of the next few months included passing on the majority of the work and eventually selling the business to someone else.

My Story

I've had five PATHs done in the last 25 years. I ask someone to facilitate one for me every three to five years to give me new direction and sustained momentum. Sometimes, I do it on my own. Each time I have been surprised at what emerges for me during the PATH process.

When I first moved to the USA and was trying to start my business again at the height of a horrible recession. I visualized in my PATH of 2002 that I would be spending a lot of time in Asia and South America. I was puzzled by this because I had never travelled to either place and did not consciously realize I had any desire or connection to go to either continent. Our daughter subsequently moved to Brazil in 2010 for a while and I ended up going to Brazil multiple times, studying Ayurveda and about the five elements there with one of her amazing teachers. As I was writing this, I went to Peru where our daughter works now. Then in 2009, I met Lilian Wang of RFOUR Limited. I was so impressed with Lilian and others she introduced me to that I chose to go to IAF (International Association of Facilitators) conferences in the Asia-Pacific region for the last eight years. I have thus been now to Melbourne, Tokyo, Singapore, Mumbai, Hualien, Taipei, Seoul and, most recently, Osaka! I also started a facilitation diversity cohort (a group of individuals from many different countries, races, generations, content and sectoral expertise, etc., who had a strong interest in developing their facilitation skills) in 2009^{xi}. Two women in that cohort are of Asian heritage.

In 2012, I co-developed a deeply meaningful facilitation course on the Five Elements of Facilitation Design. I had been wanting to do this for years but was missing the needed framework. The journey of developing this course caused me to have some of the deepest insights I've ever had about facilitation. It allowed me to quickly determine what we as facilitators are really trying to do with any group situation and how to work with that situation. I began a virtual two-year international cohort of 20 in 2018. And, I continue to grow in my facilitator friendships and work partnerships in Asia Pacific. I would not be writing this book chapter without this connection to that region. It all started and grew as a result of the insights and intentions I realized during my PATH sessions.

After you complete your PATH ...

I like to hang my PATH up in a place where I can savour it for quite a while. I re-read all the phrases and look at the photos. I show it to others who care or who are interested. Again, this integrates the material and “the dream”. You will not likely achieve all of your possibilities and goals exactly as stated but many will materialize in different ways. Expect to be surprised. If you have done the PATH for someone else, check in with them after a few weeks and see if they have taken their first step (that is, part 8 of the process). The power of facilitation here is about taking the time to reflect, articulating a vision and then making it tangible and visible.

PATH Testimonials

This is what some of my friends and colleagues have said, months or years after I have facilitated their PATH for them:

“Retirement was the perfect time to consult Barbara and develop a PATH. It was a great vehicle to brainstorm and make a value-based plan as a couple that has guided us well this first year.

After it was completed, we put up our PATH on our dining room wall. It sparked many conversations between us but, more importantly, with our kids, friends and extended family. They asked many probing questions, which helped sharpen our plan, but also gave them the insight into who we are at this stage and where we are headed.

One difficult thing that occurred as a result of the PATH process is that I realized that in order to accomplish my goals this first year, I would have to be separated from my wife for three months to complete training in tropical medicine and to do volunteer work in a refugee camp. Her support in this endeavour was critical and, while challenging at times, we balanced the times away with rich adventures, meaningful work and physical challenges that we both have loved.

As we look at our PATH today, we realize how much more there is to do!”

— Joe Sullivan, medical doctor, and Carol Gelfer, healthcare consultant and facilitator, USA.

“I experienced a very empowering process of creating my PATH with Barbara and it has truly been a GIFT. I visualized a life in the future that was so vivid, especially with volunteering with IAF (International Association of Facilitators) and growing leaders. I vividly saw facilitation as a buzzword, and the value being seen everywhere. I also saw a strong online network of support and lots of sharing. The process was powerful, I was able to access my subconscious mind and felt confident to chalk out the future with clarity. Within a month, I started the IAF Asia Quarterly Newsletter and coincidentally it is called IAF Asia Buzz —and I started the Asia Regional Leadership team with a group of passionate members who are supporting amazing initiatives within the region. This is only the tip of the PATH!”

—Farah Shahed, International Association of Facilitators Asia Regional Coordinator;

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Trainer, Coach and Facilitator, India.

“I like that PATH uses visuals to guide the planning process. Through the PATH session, I gained greater clarity of the support that would help me achieve my goals. One of my goals identified during the session was to be certified as an ICF Associate Certified Coach. I managed to do it within a year of the session by working on the items to ‘enroll’ and ‘strengthen’ that were identified during the session. I still have my PATH pasted on my wall and it puts a smile on my face every time I look at it because it reminds me of my purpose and my dream.”

— Lyn Wong, CPF©, ACC, Singapore.

Preparation and Supplies

Note: You could also create a virtual template and do entirely online with drawing tools.

- Unlike the collage method, this one requires that you are emotionally and psychologically ready. It will yield much better results if you have been thinking about your future for a while, have a few ideas and are ready to commit to action.
- Plan to take 2.5–3 hours to do your own PATH.
- You will want absolute quiet and attention for up to three hours. Alternately, you could do the first two steps in 90 minutes and the last steps in another 90 minutes.

Supplies you need include:

- Large sheet of paper (flipchart size or 1–2 metres long).
- Markers of many colours—fine-tipped and thicker ones.
- Chalk for creating colour in the columns and arrows.
- Some gentle visualization music. Quiet instrumental music is helpful for the guided visualization.

The Grove Graphic Personal Compass Workbook ^{xii}

Why and when do you do this?

This method will work well if you like visual templates. It uses graphics, graphs and charts, so it appeals to both those who are very visual and those who are very logical. The authors call it fun, insightful and empowering. I agree strongly with all three words. There are visual timelines, time sheets and details I would not normally think of in planning. It can be done entirely on your own although I recommend doing it with a group of friends or trusted colleagues. This method is effective because:

- it appeals to both visual and logical learners.

- it can be done on your own.
- it is helpful for big changes in life.

I would recommend this to anyone at any stage of life. It is especially helpful when you want to make BIG changes in your life. You need a lot of time to do this well, and to do every step (about 30–90 minutes per step).

Here is a short story of a colleague of mine who did this process with me and eight other facilitators over a day. We each worked individually but shared our products after each section in the Compass workbook. This provided validation, encouragement and clarity to keep moving onto the next section.

“With a group of fellow facilitators, I participated in the Grove Consultants Personal Compass process. The steps to evaluate where I was and where I wanted to go brought clarity to the balance I wanted to achieve among many interests: consulting, fighting for social and racial justice, spending time with family, travelling and playing guitar. I was able to chart a path towards achieving balance, which I have successfully followed (with a few backward slips along the way). I feel it was important that this process was more successful for me because it was facilitated within a small group. The facilitation created opportunities to share and reflect, then refine the vision of my future.”

– Paul Krissel, Organization Development and Change Consultant, USA

Preparation and Supplies

- Multiple sessions of 30–90 minutes. It could take several weeks or months to complete this.
- Purchase the book from Grove Consultants (noted in citations).
- Writing and highlighter pens.
- Background music (if helpful).
- A bigger table or desk space without distractions. The booklet is spiral bound and about ½ meter long.

What is the method?

This is a do-it-yourself guide called the personal compass. There are seven steps:

1. Starting point: You come up with a guiding over arching or focus question to start and answer four questions: What is calling me? What is pressing? Where do I come from? And who’s involved?
2. History: You can plot up to 20 years of your life—dreams, aspirations, peaks and valleys, key events and people, places and occupations and learnings.

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3. Cross-section: This is an opportunity to assess how you spend your time. A typical week is broken up into one-hour pie wedges. You indicate how much time you spend on typical daily activities like work, family, friends, recreation, commuting, reading, device time, etc. Then you rate your satisfaction on the amount of time you spend on each activity.
4. Inventory: This is basically a SWOT analysis—an analysis of current Strengths and Weaknesses and future Opportunities and Threats.
5. Vision: You imagine your life in the future (several years ahead) and fill in a template that focuses on any or all relationships, accomplishments, experiences, joys, contributions, environment and inner qualities.
6. Choices: This template invites you to narrow down the scope of what you have been doing, discern and prioritise key pieces of your vision into themes and write a purpose statement.
7. Action plan: This is where you become detailed—writing out objectives, time-frame and tasks among many other things. This final step draws on many of the earlier templates. There are four blank pages with the same graphic if you really love the detailed part of planning.

My Story

I did this Grove Personal Compass process at a time when I was suffering from a debilitating neck injury. I literally had a pain in the neck reminding me once again to slow down. The power of this facilitation process was clarity about how I use my time versus how I want to use my time. Using this method, I also came up with a life purpose statement at that time of my life of which I was really proud:

“Connect deeply with my joy, my family, my culture, while being a thoughtful generous ally to diverse younger or underrepresented leaders.”

This has guided me, my decision-making and choices well for many years. For example, based on Step 3, the cross-section activity, I was astonished at how much time I spent driving to places. I have since reduced my driving distance to 30 per cent of what I used to do and driving time to about 10 per cent of what I used to do.

I watched myself have a bigger impact when I switched to a more reflective, carefully focused life.

I negotiated with clients and colleagues to do virtual meetings. Instead of driving to a place for face-to-face meetings, I purchased and learned new virtual technologies to do this well. It then resulted in me offering many online courses. This was a whole new aspect of my business I would not have done if I had not done the cross-section time-line from the workbook.

After you complete the Grove Personal Compass Workbook...

Again, as with all methods, it is best to review the pages you filled out many times. There may be certain ones that compel you to re-evaluate your life. As noted above, I found this with the cross-section. I recreated some of the templates I liked and repeated some of the exercises several years later.

Have a conversation with key people in your life to help you stay on purpose and to follow through with tasks. You may also need support making the big changes like I did. Ask loved ones to keep you accountable.

Using the facilitation for personal reflection, change and growth are some of the most satisfying things I've done with my life. It has also been the most consistently powerful way of helping myself to help others.

Conclusion

Each of these techniques are used by process facilitators. As group facilitators, we may use them differently. For example, facilitators may do a group collage for visioning, or have the group draw pictures and then tell stories of their future. We may use much bigger templates that cover a full wall for a group PATH and a Compass workbook type of activity. But as I hope to have shown, they work very well for individuals and for groups.

The power of self-facilitation is waiting to be fulfilled in each one of us. Each of us lives on a spectrum that ranges from a highly reflective life to a life that is busy, filled with doing things that are or seem important. I am obviously biased toward reflection and have trained myself to lead a more reflective life. It did not come easily. It was only after major illnesses and accidents that I learned my super “go-go-go” lifestyle was not sustainable. I have watched myself have a bigger impact when I switched to a more reflective, focused life.

The problem is we are not usually taught how to be reflective. Nor are we invited to be reflective. Instead, for the most part, we are programmed to rush from thing to thing as though our very survival depends on it. We may be chasing some unconscious and even unexamined dream of achieving a prosperous, wealthy life. Or, we may have had so many setbacks in our life that we are living a life of just barely surviving.

Self-reflection using any facilitation method or journaling with good questions will help you grow. Being clearer in your own words and actions in life, will also help you help others in your community, family, friends and colleagues. When I allow myself to think really big, I imagine that self-facilitated people will heal the planet, deal with global crises, wars, and maybe even save us from self-destruction.

Using facilitation for personal reflection, change and growth are some of the most satisfying things I've done with my life. It has also been the most consistently powerful way of helping others make the changes they wish to make.

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Jesse's Story Part V

Remember our main story hero, Jesse? Jesse thought they had to be this hard person, doing their job well, never stopping to realize how unsatisfying and degrading the work was. In a single day, they were reminded of their goodness, and need to honour their internal values. Jesse made a big decision that day when they finally had a chance to reflect in a safe environment.

And, most surprising was that Jesse came back to fully take part in the two-day conference. Their original intention had been just to come to a pre-conference session to get their professional development required credits. At the main conference, we were surprised again. We watched Jesse participate in every activity thoroughly and enjoyably. The next day Jesse reached out to me, took my hand and said, "Your workshop was a gift to me. I realize I have to stop hanging out with so many bad people and start hanging out with nice people like the ones at this conference."

What helped with this truly transformative situation? I think Jesse needed to be heard. We did that. I did that. My co-facilitator did that. All of the participants did that. Jesse showed up, participated in every self-reflection activity fully, and really began to use everyone in the room to help them get to where they needed to be. Self-facilitation helps us "show up" authentically and as we wish to be in the world.



Visual summary by Kailin Huang

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Chapter 8

Living a Facilitative Life

Kavi Arasu and Stephen Berkeley

The three of them sit under a huge banyan tree that stands tall on the edge of the village. “It has stood here forever,” they say, with animated gestures that can roughly translate as “forever”! Rajvel, the leader of the panchayat (village council) and amongst the elders in the village, looks on. With a big twirling moustache and worn hands that have seen many seasons and several crops, he smiles. We get talking about their lives, our times, aspirations, differences and hopes. With a twinkle in his eye, he says, “You have to take people along. You have no choice. The village has no future if you don’t take people along.” The two other men stare into the sky. Their silence bore no indication of how strongly they lived that belief.

“We want to make a case for the power of facilitation, and a case for you. Actually, it’s a case that facilitation is within you.”

More on that later.

We have been following a hunch and going in search of evidence. Much like curious children with a Hercule Poirot⁶ mind-set. Our travel and conversations standing in for magnifying glasses that would typify a detective. And a dozen or more research papers and books that remain on our respective work desks. Between animated conversations and deep, reflective silences (and everything in between), this chapter got scripted. And so, indulge us, dear reader and spend some time absorbing this and marinating it in your mind later. It is, after all, a labour of love.

We want to make a case for the power of facilitation, and a case for you. Actually, it’s a case that facilitation is within you. Whoever you are. A novice. A business leader. A home-maker. A village elder. Whoever you are! We say that the power of facilitation, in its most basic form, is present in everyone around us.

We hasten to add context. The professional domain of facilitation with its tools and techniques for the modern-day world are of recent origin. Facilitation as a way of living and

⁶ Hercule Poirot is a fictional Belgian detective, created by Agatha Christie. Poirot is one of Christie’s most famous and long-running characters, appearing in 33 novels, published between 1920 and 1975. He was unsurpassed in his intelligence and his investigative, curious mind.

life has been long familiar to humankind. Facilitation continues to be present in varying degrees in every person. Not everyone realizes that yet. Our aim is to make it apparent for everyone.

Fishing in Deep Waters

We are well aware that process facilitation, which all the authors of this book revel in, is an established practice. A practice with ways of working, structure, competence, practitioners, certification and the like. A body of knowledge and work. It has made (and continues to make) tremendous value and difference to people the world over. It is there for all to see.

We want to go deeper than what's available on the surface and emerge with pearls for all to see. We want to shake off our established ways of thinking and poke around to see what other riches we can find. We have simple questions. How did facilitation start? Why has it gained so much acceptance? What must it have been like at the beginning? What is at the very core? Who else practises it without knowing they do?

And then, of course, to ponder over what makes great facilitators truly great. We want to shine the torch on the world beyond those most familiar to facilitation to help us draw new renewal and raw energy. By that process, we seek to energize everyone to do their part to create a better world.

For now, let's dive into facilitation.

At the very root of it all, several people argue, is the Latin word for "easy", which is "facilis". The origin of facilitation seems to be moored on "making it easier". Our readings have pointed us in the direction of researchers and writers contesting that definition, arguing that it is far too inadequate. We understand that. Yet we want to begin there. For, in the mood of easy, it makes for a good clean start. But we don't want to stop there, of course.

We want to dive deeper. Even as we want to do that, we are certain that this is not a piece of rigorous academic research. For now, we prefer anecdotal pointers over precise data. Conversation over statistics. Our interests and attention lie in reading and discussions, on history, anthropology, the evolution of society, work and so on. And even as we start out, we are aware of confirmation bias⁷ that we are bound to carry with us. We have been facilitators in the way the modern-day world recognizes. We are passionate about the topic and on many occasions, it puts bread on the table if not a song in the heart. For now, we can only make conscious promises to call out confirmation bias when we spot it and leave the rest to you, the prescient reader, to do the rest of the work!

Our purpose is clear. We want to explore whether there are ways of enthusing a casual bystander to believe in the power of facilitation. We would love to move conversations in the facilitator community beyond tools and practice. We believe that to infuse more life than there is into a discipline, you need to broaden the conversations. That is our North Star.

⁷ **Confirmation bias** is the tendency to search for, interpret, favour, and recall information in a way that confirms one's pre-existing beliefs or hypotheses. en.wikipedia.org/wiki/Confirmation_bias

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We also want to ensure that we leave you, the reader, with some tangible aspects to consider to get better at the game. Be that the game of life, or the game of facilitation. And we don't want it to be our grand pronouncement, but a humble distillation of conversations across the board.

We have been working on a project we have titled 'Building Bridges Breaking Walls—One Story at a Time'. We believe facilitation is an important piece of life in a future filled with choices, differences and dire consequences. We see this project as a small attempt to help add more life to a life skill.

This project took us to people around the world and is a result of many hours of conversation. We are richer by the realization that the riches of facilitation are ours for the asking. As we spoke to people, we explored the past and evolved a thematic map for the future. So, we go, back to the future!

Before we take you back to the village where we started out, we want to tell you something. In the ensuing pages, the stories we share are interspersed with our thoughts. We share only a fraction of the various conversations had and share them here in no particular order. Every conversation was valuable and has influenced our thinking. The stories we share here are to illustrate a point and hopefully they will inspire you to look around you for stories as well. So, now back to the village.

Even as the sun sets, casting its lengthy shadows on the dusty South Indian village, the three men offer some more tea. We have had a good conversation. They have spoken about their lives, the stories they have heard from their forefathers. Some practices that they follow to ensure the village stays invested in its future and lending hope for the future. "It's good that the city has come to the village to listen to the villager." Says the elder amongst them. And as the small laughs settle, he adds, "You know, it all started in the village."

Back to the Future

But first, some rewinding into the pathways we have walked. How about some anthropology and literature? More to set the stage than anything else.

"Man is by nature a social animal; an individual who is unsocial naturally and not accidentally is either beneath our notice or more than human. Society is something that precedes the individual. Anyone who either cannot lead the common life or is so self-sufficient as not to need to, and therefore does not partake of society, is either a beast or a god," said Aristotle.ⁱ

The emphasis on the collective is in your face. It is stark. Whilst Aristotle and the Greeks said it well, several anthropological studies point to evidence that it existed far earlier. Our own curiosity took us in different directions. The origin of language was one key pit stop. Recent anthropological research points to some interesting questions and facets. Robin Dunbar's views on Theory of Mind and the Evolution of Languageⁱⁱ piqued our interest. He argues that the evolution of language is not a consequence of large brains that were formed in primates. But rather, the brain size was more to do with social requirements

of working in groups. Speaking of primates and brain sizes, he says, “The need to hold large highly structured groups together has been more important than the need to solve ecological problems.”

Research and evidence point to species growing larger brains to co-exist. Group co-existence necessitates a level of working together, norming, kinship and living together. Dunbar says, “The need to evolve large groups drove brain size upwards, and this, in turn, eventually required the evolution of language as a more effective bonding device.” Hector Villarreal Lozoya draws this connection more directly in his chapter on team development.

For millions of years, we have been living in groups. For thousands of years, humans devised formal structures for groups to work and cohabit. Be they tribes, communities, civilizations, countries and so on. Take, for example, the idea of democracy. The word comes from ‘demos,’ common people and ‘kratia,’ power/ rule. Earliest mentions take us back to 508 BC. For a whole civilization to be able to function like this, it is implicit that there must have been a way of having a participative dialogue and conversation for many people at one time. The idea of public participation for collective decisions is powerful.

Public participation is not a recent phenomenon; it is an inherent part of human civilisation.ⁱⁱⁱ Every civilization has had its own version of collective participation in decision

“It is hard to imagine a collective of people coming together to take decisions, functioning without a facilitator to the conversation.”

making for common good. Ancient India had the Sabhas and Samitis, which are quoted in the Vedas (1200—900 BC).^{iv} People gathered, deliberated on issues, took decisions, advised the king and had representation across different strata of society. It is hard to imagine a collective of people coming together to take decisions, functioning without a facilitator to the conversation. Every congregation of people would have needed to consider alternatives, explore dilemmas

and take calls. Perhaps there was no role designated as a facilitator but the role was assumed by someone in each of these bodies. The tribal chief. The village elder. The king. The noble man. The philosopher. And so on. A person or role that held the group together in dialogue.

Many indigenous populations, in fact, have words for describing this “holding”. Amongst the Pintupi people, an Australian Aboriginal group who originate from the Gibson Desert, referred to a “leader” as mayutju (boss), tjila (big one) and ngurrakartu (custodian). These people are described as “holding” or “looking after” (kanyininpa) their family, kin, subordinates and country. A boss is yungkupayi, someone “who freely gives”, a “generous one”. They will “look after” (kanyilku) people and country.^v

The human facilitative bone surely has evolved over time as with society. Plato ran an academy where philosophy was taught. To be statesman-like required an ability to ask deep questions and debate dilemmas. He posited that philosophers made great kings and drew strength from debating questions and getting people to think as a collective.

Nalanda in 5th century AD in India boasted a grand university. More than 10,000 students

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studied there—with over 2,000 professors from what is now Korea, Japan, China, Tibet, Indonesia, Persia and Turkey.^{vi} The 9th century saw the university of Al-Karaouine and a bunch of other universities in the next 300 years.^{vii} These places of learning helped learning and thought exchange take place in real time, thus moving societies forward.

The 12th and 13th centuries saw European institutions for higher learning come to being.^{viii} The works of Arabic texts and Aristotle becoming available in the 12th century saw new beginnings.^{ix} From grouping together for safety and social connection, people were making moves to continuously create new realities. One of which was to learn together and bring worlds closer. When the worlds themselves were far apart from each other. With none of the communication tools of the present-day world, people still came together, worked as groups and made meaning for themselves and for each other too.

Different societies would possibly have had different levels of devolution of power to groups for decision-making. But the premise is this: as we evolved through the years, living in tribes and belonging to communities, moving forward as a collective was one very important way to be. It had to compete at times with autocratic and other forms of leadership. Collectives, on their part, need facilitators or facilitative leadership styles to hear the group and move forward.

Perhaps it was primitive, but it is an ample pointer in the direction that the role of the facilitator or the style of facilitative leadership is not new!

If that is a premise that we hold dear, that the facilitative bone has been with us through the ages, we choose to extend it into the present as well. We believe that the facilitative bone exists in all of us and we will find some part of it if only we care to look hard. Armed with that hypothesis, we went out and had conversations with a number of people. People who didn't call themselves facilitators. These were people who we thought, were leading a facilitative life.

These people keep making a difference in how they work with groups. Irrespective of what their titles or their professions were. The radio jockey. The truck driver. The housing society manager. The CEO. The midwife. The musician. The building contractor. These were the spectrum of people we interviewed.

The more we spoke to them and teased out their own approaches to life and living, the more apparent it became to us what it meant to lead a facilitative life. Mind you, they did not claim to lead one. They were just going about their lives as ordinary human beings. It was us, the seekers, who saw in them the remarkable difference they were making, in their own way.

The Nature of Living a Facilitative Life

We sat in silence many a time, satiated with the richness around us. Knowing fully well that is available to all of us on tap yet the busyness that engulfs us, gobbles that richness too. During this reflection, we arrived at three themes that are common to all the folks that we met with. Themes that we distilled out through careful perusal and deliberation. Show

Up. Meta Knowing. Lattice Sensing. We want to offer these to you, dear reader, not with the rigour and definitiveness of academic research, but with the humility of storytellers. We invite you to play with these ideas and see what emerges for you.

1. Show Up

“Eighty per cent of success is just showing up,” said Woody Allen.^x The understated power that resides in that sentence is often missed. Showing up takes courage. It takes a bunch of other things too. A genuine interest in getting people to move forward past their immediate situations. This is quite a common ask, you may say. You are absolutely right. It is a common ask, that often at times, does not get its due.

Allow us to explain, with the use of three different prisms.

The first. A predominant narrative in the world today runs on narrow individualistic rails with an engine called WIIFM. That is “What’s In It For Me?” for the uninitiated. What’s wrong with that, you may ask? The problem is that the WIIFM story has been stretched to move from being an occasional thought, to a widely held narrative. Part of Showing Up is to show up with a different mind-set: “How Can I Help?”

That is a significant shift for several and the payoffs are in multiples. Just that the multiples don’t appear instantly in the form that will be most desired. Across all our conversations, we found a sense of service superseding any thoughts of rewards for self.

If showing up without a specific reward is disquieting, consider the second prism: Showing up without invitation!

Showing up without an explicit invitation requires a degree of courage that is beyond the ordinary. It means that the facilitative bone creates the space and builds a platform when everyone else is busy with emotions of the problem.

Life doesn’t provide us with invitations to step up, gather ourselves and step in to help people. Life provides us with opportunities to do so every minute. People who do it all the time, often do it without a thought that they are doing so.

“The facilitative bone creates the space and builds a platform when everyone else is busy with emotions of the problem.”

“The only thing that you have to remember is to be careful not to try and solve all their problems,” says Rajvel, the village elder you read of earlier. “We have to believe that people are resourceful and that you step in to channel those resources when you think they are not seeing it all.” That choice making makes a difference. That perhaps is an intuitive ability that builds over time. This is integral to showing up. This makes showing up meaningful.

That provides the perfect window to the third prism: Tightly & Lightly. People who lead with a facilitative leadership style hold themselves lightly but regard the work that the group will do rather tightly.

“When people are at loggerheads, they are running on high emotion. They can go in all

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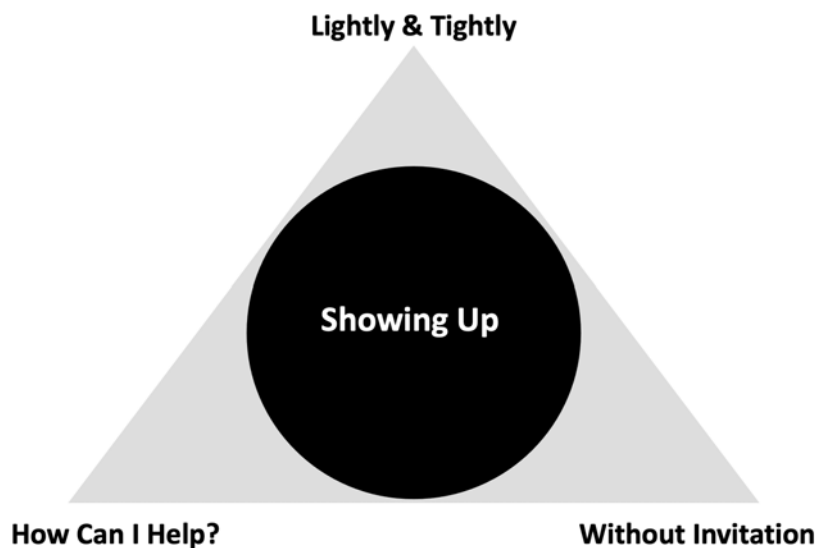
directions. You have to earn the right to help them stay focused on something that will be useful.” That was Venu, a building contractor who has had remarkable success in putting together a contract workforce. He has no direct employees but a set of people who want to work with him, contract after contract. “In the construction business, problems are plenty. We are always facing constraints and interests. The problem can be looked at from many angles and when you look at it from a new angle, the problem appears different. You need empathy, patience and help people converge to middle ground.”

“He jumps right in and we think he is a fair man,” said one of his contract workers. Venu himself doesn’t think of it as much. “We have a job to do. Everyone has a different way of doing it. If we give a chance to hear another’s view, then we get a new angle. I just help if another angle can be added. It’s a small thing,” he says, with a wave of a hand.

This got the contract worker to chip in. “He is not doing it for himself.

That’s the other bit.”

People who have a pronounced facilitative bone in them are more interested in the people that work with them than their own interests in the problem. They regard themselves lightly and are intent on hearing the other person out. This helps clarify the voice from the emotional noise and bring people together towards the outcome.



These prisms, in our minds, add richness to Showing Up. Showing Up is not just opening the door and making an entry with a bang. It means a silent, unobtrusive and courageous entry. This gets the group to focus on the task at hand. That is Showing Up in full.

2. Meta-Knowing is Not Knowing

One of the greatest advancements to human life has been the ability to predict, to a reasonable degree of accuracy, stuff that was previously given to chance. How soon will you get from Place A to Place B? Will there be rain next week in Brisbane? What are the chances

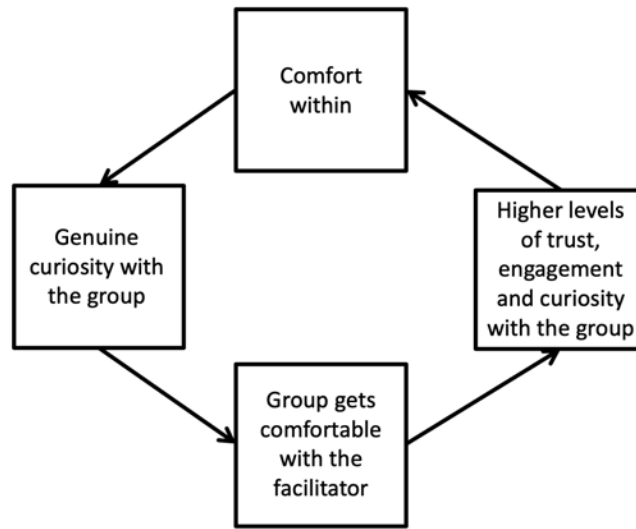
that my package will reach London? The number of steps walked on a given day? A while ago, arriving at answers to these were all matters of chance. Not anymore.

Today, these predictions sit coily in the palms of our hands. These and several other aspects have added a definitive layer to our life. So much so that we seek such definitiveness

“The only knowing that they have is that of ‘non-knowing’ what will emerge from a conversation.”

in every move of our life and without this definitiveness, we feel out of depth. Yet group processes are about human behaviour and they happen in the moment. They have jagged edges and jarred boundaries. Precision doesn't quite fit. We do not know what will happen in any given moment.

People who have a way with groups know this well. In fact, the only knowing that they have is that of “non-knowing” what will emerge from a conversation. To be comfortable with that has a deep impact on the group. From that comfort comes a degree of childlike curiosity about what the next move the group is willing to make. That curiosity gives a whimsical energy that wilts any lingering doubt about the interest of the facilitator superseding that of the group's.



Meta Knowing Frame

What aids in people getting this comfort with “not knowing”?

For starters, it is a deep sense of self (You will find some neat tools in Babrbara MacKay's chapter on The Power of Facilitation for Self-Reflection, Change and Personal Growth for this state of connection). An inner compass that seems to get people to first understand who they are. Most of the people we spoke with had no qualms telling us where they usually trip up. “Anyone who indulges in luxury, comes across to me as someone ‘showing off wealth’. It puts me off. I know that. And whenever I find someone with a degree of ostentation, I am conscious that I am put off by this and am careful that it does not come in the way of knowing the person better. It's an effort.” This was Manfred, CEO of a large enterprise who is well regarded amongst his people. To be aware of biases and to be sensitive to them makes a huge difference.

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The other piece is the moral hand of the inner compass. The moral hand of the inner compass, firmly pointed in the direction of the collective good, helps. That means building a degree of congruence between what you say, what you do and who you are. “If you are not authentic, people see through that,” Rajvel says, “Dissonance can easily be spotted.”

Rajvel brought out another dimension. “Compassion with people and self is important. This is about being very human. One is human and will make mistakes.” To view everything with compassion frees people up to speak their view and not look to orchestrate results. It is a process. And it begins with the leader and their compassion and acceptance of themselves. The power of facilitation, therefore, resides in sensing and harnessing the energy of the group. This requires a minute-by-minute presence, each minute not knowing what the next will beget. Knowing this frees up the facilitator to draw upon all of the groups resources. This is “meta knowing”.

3. Lattice Sensing

The first thing anyone will notice about Venu, the building contractor, is his intense eyes and calm demeanour. In his work overalls and covered with dirt and grime, his ability to look beyond what is stated is uncanny. A plumber entered the room stating, “Am I going to fix the bathrooms on the 15th floor now?” Venu’s response: “What time did you finish yesterday?”

It was an interesting exchange, with them deciding that they will do the 15th floor the last. Venu shared later, “Normally, he is a lot more cheerful when he states that. He is sprightlier. Never with a slouched shoulder. I think he likes the view from the 15th floor. Today, there wasn’t as much energy in his voice.” It did turn out that the plumber had a late night and he wanted to finish and get home soon. “The work in the 15th floor requires his full attention. Perhaps he can do it tomorrow,” he said.

To a bystander, that difference in tone and intonation would be difficult to catch. When you listen with your eyes, you are seeing everything happening around you. It adds a layer by soaking in every sound. When you see with your ears, you not only hear what is spoken but watch out for the tone, the twitch of the lip, the fret of the brow, the smile in the corner of the eye. This is what we call lattice sensing.

The lattice has layers and angles. Those layers create strength for the design. A lattice gives you a picture of symmetry and depth. Lattice sensing is to make meaning from the many layers and angles in the conversation, what is said, not said, loud and silent, colourful, black and white and grey. Seen and felt. A good facilitator works with the many layers and angles.

David, a musician and artist who works with a wide spectrum of people, spanning countries and cultures, has a way of solving challenges. He understands that people often just need someone to talk to. Someone to hear their story. He says, “Being a listener is help in itself. It is not what they are saying, but feeling where they are coming from. Accepting where they are at helps people feel they are not alone. It does not matter what I say, they have to experience it for themselves. It is not about giving advice or trying to influence. It has to be that person’s choice. If I have expectations or attachment to what I say, it can have

an adverse impact on their ability to move forward. There is a fine line between caring for them and getting involved in their drama.” David practises lattice sensing.

You make sense of everything around you by paying complete attention and deploying more than one sensory organ. It means that people like Venu and David bring about a presence that sets the tone for a conversation. They give themselves to the moment and to the group in front of them. They are doing all of this without getting distracted by a debate or any device or process.

Rajvel, the village, elder added another important dimension, as always. “Sometimes we don’t know what to do, and don’t have much to say at times. It is OK to sit in silence. We just sit there under the tree and decide to reconvene.”

To many of us, silence can be unnerving. To be able to read into the silence and to stay secure with the thought that it is part of being human is key. That is not everyone’s game for sure. But that is an important part of the ask.

To the uninitiated, lattice sensing can be in the realm of the magical or the happy coincidence. The difference that it makes to outcomes is humongous. Perhaps you can get started by listening to the smiles, sighs and emotions in every conversation that you have. Stuff that is not explicit but that you are able to catch.

Years ago, we were introduced to active journaling of observations. The exercise is to sit down and make a list of all feelings and emotions after a conversation is over. We realized that when we begin to look for it, we see, hear and know much more! When was the last time you looked for more than you could see or strain to hear through the silence in the room? Well, there is always a next time.

Leading a facilitative life often is a huge catalyst for effectiveness in the present-day world. It doesn’t matter which profession that you are in. Strengthening the facilitative bone that resides in you will stand you in great stead. Reasons abound. Here are two.

*“If we offer our ear,
people are ready to
open their hearts.”*

Firstly, with the spread of social technologies, geography is history and the world is shrinking. Knowledge resides in everyone’s fingertips, free to be deployed at will. That can also lead us to being holed up in our own world. It’s as if giant walls come up in our minds with information that supports our views and biases, thereby leaving less space for anyone with a different view.

The future of the planet is at stake and it will take all of us from all sides to do our bit. To make sense of the emerging world as a collective, and thus shaping our future, is an ask that stares at us.

There are clear pointers to how “walls” are default and bridges need to be designed. Walls come up first in the mind and are easy, lazy defaults.

Technology has helped us congregate within our communities where similarities abound. As has been discussed in previous chapters, we need more effort to traverse the echo chamber and embrace differences to be able to see new worlds.

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Secondly, demographic differences compounded by income inequality are huge challenge that confronts the world. With more millennials (1980– 2000) and Gen Zs (2000–2020) in the world, there are tectonic shifts that need urgent work. These have their collective futures at stake. There are so many angles to each argument made here. Each is valid from a particular angle. Obviously, the work that needs to be done is at the intersections of these angles. That requires a facilitative state of mind.

There are other challenges and jagged edges pointing to history, borders, culture, climate, wealth, technology and so on. The answers to questions in these spaces will involve complex variables that will mandate dialogue. The future of work and sustained life on the planet depends on how we are able to engage with each other, listen to another's point of view, resolve differences and live together.

Rajvel, the village panchayat head, David, the musician, Venu, the contractor, and every single one of the people that we met spoke with quiet courage about their lives. They taught us that if we offer our ears, people are ready to open their hearts. They went about diligently doing their work. They were not trying to change the world. But in trying to go about diligently doing their work, taking their people along, they were contributing to change in the world.

Changing the world may sound like an onerous proposition. Like all good things it starts with a showing up. Knowing full well that you do not know everything. When you combine showing up with being open to possibilities, and being fully present to what you are seeing and not seeing, you tap into the power of facilitation within you. And that is showing up, meta knowing and lattice sensing.

Even as we type out the last lines of this chapter, we are left with nothing but a deeper resolve to go out and talk to people. The last word will remain beyond our grasp as human kind perpetually evolves. Human kind will need to make sense to what emerges and keep coming together to make collective meanings of new realities and take action.

Let's begin.



Visual summary by Chitra Chandrashekhar

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- ix. Wikipedia *Medieval University*: https://en.wikipedia.org/wiki/Medieval_university
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Chapter 9

Conclusion and Final Thoughts

Kimberly Bain

Throughout the previous chapters, we have asserted that *the power of facilitation*:

- can help us strategically think better together;
- can transform organizations and enable positive and sustainable cultural change, at all levels and across all business lines;
- can create the time and space for critical thinking to flourish and innovation to blossom;
- can enable individuals, groups and nations to resolve conflicts constructively, moving from a mentality of “beat and defeat” to “together we can”;
- can help groups of disparate individuals evolve into high performing teams and collaborate at a higher level;
- can help us individually identify and reach our innermost aspirations and our highest potential; and,
- is ageless and is one of the reasons, and possibly a key reason, that humans have evolved to where we are today.

While some people might feel that where we have evolved to today is not a good thing that is a discussion for another time. However, humans have been able to evolve and create many positive advances through collaboration and intentional conversations throughout our history. Perhaps we would have evolved to somewhere even better than where we find ourselves now, if the power of facilitation had been a bit more evident a bit earlier. We believe the impacts of the power of facilitation described in this book, offers us hope for the future and provides actionable, concrete steps that can help each of us—our groups, our organizations and our communities—to evolve, explore and grow a better shared future. Thinking together is key, and facilitation is the engine to get us there!

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In this book, we have strived to make the case for the power of facilitation to be harnessed by us all—individuals, leaders, organizations and societies—to solve seemingly unsolvable problems.¹ That is, we realize, a daunting task that some would say is even a bit fanatical. They're right. It is. However, throughout the preceding chapters we have not once said it was easy. Nor have we ever intoned it is pointless or hopeless.

Facilitation methods and tools are only the tip of the iceberg when it comes to helping people think better together. In our experience, an exclusive focus on tools fails to unleash the true transformative impact that we know facilitation can ignite. We believe that the power of facilitation is derived from the competence, ethics, and also the stance of the facilitator. It is not only derived from the way we facilitate, but also the way think and act as facilitators. The skills, knowledge and attitudes of the facilitator—all underpinned by a deeply held philosophical belief in the power of facilitation—are what enables the types of transformative impacts described throughout this book. It is also what is necessary to move our groups, organizations and societies forward.

That being said, our deepest hope is that we have ignited a spark in you. We want you to experiment with the power of facilitation and utilize some of the ideas in this book. We want you to explore how to help your teams and communities think better together. We invite you to take on the stance of a facilitator. We think the results you get will then inspire you to explore facilitation further.

OK, I'm convinced of the Power of Facilitation. So how do I harness it?

Discovering *the power of facilitation* is the most important step towards harnessing its strength and potential. This book was written as a collaborative effort by a group of dedicated and, yes fanatical, facilitators. Our aim is to both speak to the converted and to help others to discover this power. Our ultimate goal with this book is to help individuals, groups, organizations and societies to grow, expand and thrive by applying the power of facilitation in their own context.

As a decision-maker, you can harness *the power of facilitation* by being a facilitative leader. You can also utilize the skills and processes throughout this book to help people engage in the intentional conversations needed to answer the unsolvable problems, resolve the conflicts, change the culture, create and innovate. You can invest in bringing in an expert to help design the process(es) best suited for your engagement, task or situation. You can train in process facilitation. And you can encourage and support your staff to learn about facilitation themselves. You can also ensure your people have the time and space to hold the authentic, and sometimes difficult, conversations and think critically together. But most importantly you can hold true the values of facilitated collaboration and the belief that the best decisions are based on the wisdom of everyone involved.

It is our contention that, *the power of facilitation* can be harnessed around the world. It can be harnessed to build understanding, to discover and strengthen connections, to resolve conflicts, to solve seemingly unsolvable problems, to strengthen creativity and

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innovation and to universally engage people in decision-making.

As we stated in the introduction, today maybe more than any point in our history, facilitation—the philosophy, the skill, the process and the profession—is critical to our future. To survive and thrive as groups, teams, organizations and societies, we need to utilize *the power of facilitation* to help us hold the authentic and intentional conversations that will help us understand ourselves, each other and the world around us. And in order to move through the chaos, uncertainty, disruption and divisiveness that seems so prevalent today, we need facilitation, and facilitators, to create the space and processes to enable us all to think together. We need to help people both speak and listen, think critically and creatively, and explore ideas that support, challenge and conflict with their own. But, most importantly, we need to help people believe in what is possible and ensure that everyone's wisdom contributes to the development of the wisest results.

To harness *the power of facilitation*, we need to challenge ourselves to live a facilitative lifestyle. We need to systematically and deliberately, think about how to engage others in everything we do and every decision we make. Einstein was famously quoted as saying, “The definition of insanity is doing the same thing over and over and expecting different results.” We are saying it is time to do things differently. We hope the stories of the impact of facilitation and the ideas shared in this book will give each of us the confidence to think better together by harnessing *the power of facilitation*!

Our parting thoughts

Motivational speaker Steve Gilliland writes, “*The true joy in life is in the trip, so enjoy the Ride!*”ⁱⁱ As a collection of colleagues from around the world, we began with the intention to write about our individual and collective insights into the power of facilitation. All our work was done virtually, across five continents and eight time zones. And while it may have seemed like a daunting task, we had a lot of fun along the way. We continuously learned, explored and challenged ourselves and each other. During a final authors' and visual contributors' meeting, we engaged in a self-facilitated reflection about the processes we used to develop and write the book, the interactions we had and the lessons we learnt. We laughed, we commiserated, we talked a lot about the time and the effort it took. But on one thing we all agreed, we definitely enjoyed the ride!

Collectively, we are now even more ‘fanatical’ about facilitation and the impacts it can ignite. We see this book not as the end of the conversation or of our work together but as the beginning of what we hope will be an exciting and expanding global dialogue. How can we collaborate to create the team, organization, community, world we want to live and work in? How can we think together better in ways that see our decisions and actions leading to positive results and impacts? How can we all harness the power of facilitation to improve our lives, communities and organizations?

Our collective purpose of writing this book was to inspire you to discover and unleash the power of facilitation in yourself and others. All solutions start with a conversation. We hope this book will be the catalyst for your own very interesting conversations. We also

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hope that you will be inspired to weave facilitation and facilitative principles throughout your life, your interactions, your thinking, your decision-making and your actions. But most of all, we hope that you will take the ideas, examples and concepts in this book and play with them in your own work and your own life. We invite you to join us in seeking to unleash the power of facilitation to ignite profound and transformative positive change everywhere.

We want to hear from you, the reader, about how the power of facilitation has made an impact in your life. We want to hear about your experiences in this area. How have you used the power of facilitation? What impacts have you witnessed or been a part of? How would you like to use the power of facilitation to change the world? Join the conversation, ask questions and share your own examples of the power of facilitation @ #FacPower.

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Appendix A

Process Descriptions, Terms and Definitions

Force Field Analysis

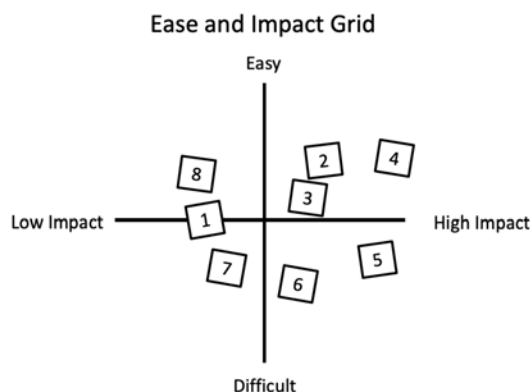
Force Field Analysis was created by Kurt Lewin in the 1940s. Lewin originally used it in his work as a social psychologist. Today, however, it is also used in organizations, when exploring change.

The idea behind Force Field Analysis is that situations are maintained by an equilibrium between forces that drive change and others that resist change. For change to happen, the driving forces must be strengthened or the resisting forces weakened.

Wikipedia contributors. (2021, April 9). Force-field analysis. Wikipedia. https://en.wikipedia.org/wiki/Force-field_analysis.

Ease and Impact Grid

An ease and impact grid is a prioritising and decision-making tool that assists people to manage their time more efficiently. An organization, team or individual assesses activities or possible solutions based on how easy the task may be and the potential impact or benefits it will have.



De Bono's Six Thinking Hats

The Six Thinking Hats provide a means for groups to plan thinking processes in a detailed and cohesive way, and in doing so to think together more effectively. The method can be used for exploring different perspectives towards a complex situation or challenge. Seeing things in various ways is often a good idea in strategy formation or complex decision-making processes.

The coloured hats are used as metaphors for the various states of mind. Switching to a certain type of thinking is symbolized by wearing a coloured hat, literally or metaphorically. These six thinking hats metaphors provide a more complete and comprehensive segregation of the types of thinking than the prejudices that are inherent to the immediate thoughts of people. All these thinking hats help people to think more deeply about a certain topic.

The hats are:

- White: logic and facts
- Red: Feelings and emotions
- Yellow: Opportunities and affordances
- Black: Threats, difficulties and barriers
- Green: Creativity
- Blue: Process or thinking about thinking

Wikipedia contributors. (2021a, April 6). *Six Thinking Hats*. Wikipedia. https://en.wikipedia.org/wiki/Six_Thinking_Hats

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Icebreakers & Energisers

The term 'icebreaker' comes from 'break the ice', which, in turn, comes from special ships called icebreakers that are designed to break up ice in arctic regions. And just as these ships make it easier for other ships to travel, an icebreaker helps to clear the way for learning to occur by making the learners more comfortable and encouraging conversation. Specifically, an icebreaker is an activity designed to help people to get to know each other and usually involves sharing names and other background information.

Energisers are quick, fun activities to liven up a group. They are particularly useful when groups may be getting sluggish and energy is waning and motivation is decreasing. An energiser will usually involve physical activity, which, in turn, will change the state of the group quickly.

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Appreciative Inquiry

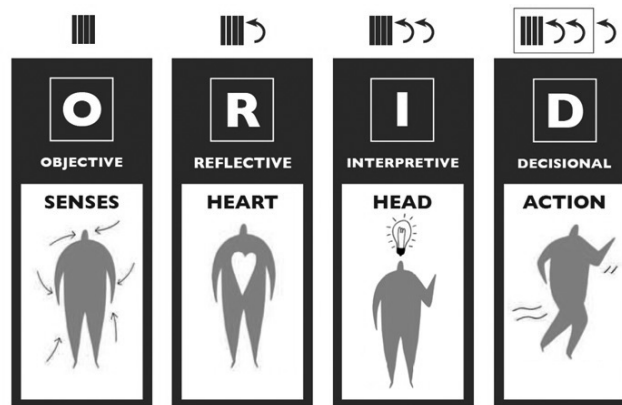
Appreciative Inquiry (AI) was developed at Case Western Reserve University's Department of Organisational Behaviour, starting with a 1987 article by David Cooperrider and Suresh Srivastva. They felt that the overuse of "problem solving" hampered any kind of social improvement, and what was needed were new methods of inquiry that would help generate new ideas and models for how to organize

AI is based on the assumption that the questions we ask will tend to focus our attention in a particular direction, that organizations evolve in the direction of the questions they most persistently and passionately ask. In the mid-1980s, most methods of assessing and evaluating a situation and then proposing solutions were based on a deficiency model, predominantly asking questions such as "What are the problems?", "What's wrong?" or "What needs to be fixed?". Instead of asking "What's the problem?", others couched the question in terms of "challenges", which still focused on deficiency, on what needs to be fixed or solved. Appreciative Inquiry was the first serious managerial method to refocus attention on what works, the positive core, and on what people really care about. Today, these ways of approaching organisational change are common.

Cooperrider, D. L. (2008). *The Appreciative Inquiry Handbook: For Leaders of Change (2nd ed.)*. Berrett-Koehler Publishers.

Wikipedia contributors. (2021a, February 15). Appreciative inquiry. Wikipedia. https://en.wikipedia.org/wiki/Appreciative_inquiry.

Focused Conversation Method



The book *The Art of Focused Conversation: 100 Sample Conversations for the Workplace* has a range of useful dialogue guides. Here's a brief excerpt adapted for brevity (and with permission⁸). Get the book for the full question set:

8 Reprinted with permission *The Art of Focused Conversation: 100 Ways to Access Wisdom in the Workplace*. The Canadian Institute of Cultural Affairs, ICA Associates Inc. Toronto. 1999. New Society Press, Gabriola Island.

Opening

- Let's talk about this. Shall we have coffee?

Objective Questions

- What are some of the facts about the decision you're facing?
- How would you describe the problem and the situation?
- What are different aspects of the problem?

Reflective Questions

- What are the demands and pressures you face on this?
- What makes it so hard to decide?
- What is it like being in this situation?

Interpretive Questions

- What are the options?
- What values do you want to hold in making this decision?
- Take the first option. What are the advantages? What is the down- side?
- Take the second option. What would be the advantage?
- What would be the disadvantage?

Decisional Questions

- What would be the impact of this decision on your life?
- What consequences will you need to be prepared for?
- What will be the first steps in carrying it out?

Closing

- This has been a very difficult choice to make... [...]

Agile Design Sprints

A sprint is a short, time-boxed period when a team works to complete a set amount of work. For More details on Agile processes please refer to agilemanifesto.org.

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The ToP Historical Scan (or Wall of Wonder or Journey Wall)

This method is a powerful tool to enable a group to learn from their diverse perspectives of a shared journey through time, to review the past in order to prepare for the future. It can be used for both small and large groups.

The Technology of Participation® (ToP)

ToP is the facilitation approach pioneered and refined by the Institute of Cultural Affairs (ICA) in over 50 years of experience worldwide. This is a proven system of methods and tools that can be adapted and applied to help all sorts of groups accomplish a wide variety of tasks together. The core values of the ToP approach are inclusive participation, teamwork and collaboration, individual and group creativity, ownership and action, and reflection and learning.

Technology of Participation (ToP) is an integrated set of facilitation methods and tools. Facilitators design and lead meetings that enable the members of the group to participate fully and focus solely on the quality and outcomes of their work. ToP was developed by ICA and is used by ICA and ToP facilitators around the world. ICA has been using ToP methods in its work with communities, organizations, companies and networks for over 40 years.

Participative Horizon Scanning

“Horizon scanning is a technique for detecting early signs of potentially important developments through a systematic examination of potential threats and opportunities, with emphasis on new technology and its effects on the issue at hand. The method calls for determining what is constant, what changes and what constantly changes. It explores novel and unexpected issues as well as persistent problems and trends, including matters at the margins of current thinking that challenge past assumptions.” - OECD Knowledge Bank.



Appendix B

Additional Resources and Recommended Reading

Facilitation books we like that are not already covered in Appendix A:

- Wayne, & Nelson, J. (2017). *Getting to the Bottom of ToP: Foundations of the Methodologies of the Technology of Participation*. iUniverse.
- Bain, K. (2014). *Becoming a Reflective Practitioner: The Reflective Ethical Facilitator's Guide* (1st ed.). BookBaby.
- Dressler, L. (2006). *Consensus Through Conversations: How to Achieve High-Commitment Decisions*. Berrett-Koehler Publishers.
- Stanfield, B. R., & Affairs, T. I. F. C. (2002). *The Workshop Book: From Individual Creativity to Group Action* (ICA series) (Illustrated ed.). New Society Publishers.
- Dressler, L. (2010). *Standing in the Fire: Leading High-Heat Meetings with Clarity, Calm, and Courage* (1st ed.). Berrett-Koehler Publishers.
- Schwarz, R. M. (2016). *The Skilled Facilitator: A Comprehensive Resource for Consultants, Facilitators, Coaches, and Trainers* (3rd ed.). Jossey-Bass.
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- Staples, B. (2013b). *Transformational Strategy: Facilitation of ToP Participatory Planning*. iUniverse.
- Barrett, F. J., & Fry, R. E. (2021). *Appreciative Inquiry: A Positive Approach to Building Cooperative Capacity* (Focus Book Series) (Focus Book a Taos Institute Publication) (1st ed.). CreateSpace Independent Publishing Platform.
- Schuman, S. (2005). *The IAF Handbook of Group Facilitation: Best Practices from the Leading Organization in Facilitation* (1st ed.). Jossey-Bass.
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- Schuman, S. (2006). *Creating a Culture of Collaboration: The International Association of Facilitators Handbook* (1st ed.). Jossey-Bass.

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Business books we like:

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- Patterson, K., Grenny, J., McMillan, R., Switzler, A., & Gregory, E. (2021). *Crucial Conversations*, Third Edition (3rd ed.). McGraw-Hill Education.
- Jackson, P. Z., & McKergow, M. (2006b). *The Solutions Focus: Making Coaching and Change SIMPLE* (2nd ed.). Nicholas Brealey Publishing.
- *Solutions Focus Working: 80 Real-life Lessons for Successful Organisational Change* (Solutions Focus at Work) Paperback – 15 May 2007 by Mark McKergow, Jenny Clarke.
- Hällstén, F.; Tengblad, S. (red.) (2006) *Medarbetarskap i praktiken.* . Lund: Studentlitteratur ISBN:9789144038988 (in Swedish).
- *Facilitating Organization Change: Lessons from Complexity Science*, Paperback – 17 Jan 2013. ISBN-13: 978-0787953300
- Olson, E. E., & Eoyang, G. H. (2001). *Facilitating Organization Change: Lessons from Complexity Science* (1st ed.). Pfeiffer.
- Heath, C., & Heath, D. (2010). *Switch: How to Change Things When Change Is Hard* (1st ed.). Crown Business.
- Mann, D. (2014). *Creating a Lean Culture: Tools to Sustain Lean Conversions*, Third Edition (3rd ed.). Productivity Press.
- Hodges, C., & Steinholtz, R. (2017). *Ethical Business Practice and Regulation: A Behavioural and Values-Based Approach to Compliance and Enforcement* (Civil Justice Systems). Hart/Beck.
- The works of Kotter, Drucker, Susashi, Tzu, Von Clausewitzch, Christensen, Collins, Kagermann, Kaplan, Norton, Porter, Porras and Powers

Additional Resources and Recommended Reading

Interesting research articles:

- Tappin, B. M., & McKay, R. T. (2016). The Illusion of Moral Superiority. *Social Psychological and Personality Science*, 8(6), 623–631. <https://doi.org/10.1177/1948550616673878>
- *Warring Egos, Toxic Individuals, Feeble Leadership: A study of conflict in the Canadian workplace*. Psychometrics Canada Ltd., 2015. psychometrics.com
- Bain, K., & Hansen, A. S. (2020). *Strengthening implementation success using large-scale consensus decision-making - A new approach to creating medical practice guidelines*. *Evaluation and Program Planning*, 79, 101730. <https://doi.org/10.1016/j.evalprogplan.2019.101730>

Associations to Follow

International Association of Facilitators: www.iaf-world.org @IAFacilitators

International Association of Business Communicators: www.iabc.com @ IABC

International Association of Visual Practitioners: www.ifvp.org @IFVP International
Association of Public Participation: www.iap2.org @iap2

Facilitation Websites and Blogs

- alignyour.org
- BainGroup.ca
- FacilProfundo.com
- Flyntrok.com
- ica-associates.ca
- lorensbergs.se
- martingilbraith.com
- medium.com/facilitation-fieldnotes
- northstarfacilitators.com

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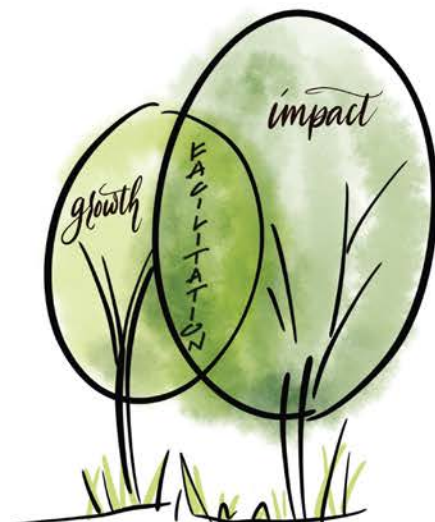
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