

Introducing Our Facilitative Leadership Courses

You have probably realised that a new style of leadership is called for today, one that releases people's creative energies and responsibilities for high quality results, as individuals and groups. Facilitative leadership is about the skilful practice of guiding group interactions. It is about having approaches to flexibly structure meetings that enable everyone's participation and reach best outcomes.

Our Facilitative Leadership courses are designed to give you both the knowledge and the practical experience of these essential skills. From the following pages you can gain more insights into facilitative leadership and some idea of what you could learn in our two-day courses, Purposeful Facilitation (Part I) and Strategic Thinking and Action (Part II). Here you can take a glance at some of the methods people experience during the courses, through demonstration and practice with feedback. Along with many other ideas and tools presented in the courses they will make your facilitative leadership work well and more enjoyable for everyone

These courses are based on the methods of the Technology of Participation (ToP™), which we describe here a bit more. ToP has been used for almost 50 years, in a wide variety of situations around the world, from communities to corporations, to foster participation, creativity and collaborative action. The underlying intent of ToP is to strengthen people's ability to discover their own resources and capacities for greatness in any given situation and to create a meaningful trustworthy future together.

ToP™ processes engage a group of people in seriously exploring a particular topic or issue, through sharing insights, integrating diverse ideas, deciding about future implications and actions and making concrete plans. They have proven themselves to work at all levels and settings, from grass roots to board rooms, even with mixed groups, with large or small numbers of participants and also for personal reflection and planning. ToP encompasses several clearly structured yet open processes that enable participants to articulate their information, experiences and concerns as well as well as hopes, to listen to others and look for underlying essence and commonness.

The methods follow through four or more natural stages:

- Collecting and accepting all data as a part of the group mind
- Intuitively finding connections between various pieces
- Discerning the deeper meaning of each cluster of ideas and finally
- Drawing out the necessary resolves based on a picture of an emerging whole of the specific topic or project.

The main ToP processes are *Focused Conversation (O.R.I.D.)*, *Consensus Workshop*, *Participatory Action Planning* and *Strategic Thinking and Action (O.V.I.D.A.)*. All of them can be used in a variety of ways depending on the situation and the intended outcome. Paramount is a preceding clarity regarding the purpose, scope and desired results, along with the willingness of all participants to listen to each other and explore the topic from various angles and with the guidance of a skilled and neutral facilitator (or several of them for larger groups). A ToP facilitator pays close attention to the overall group process and individuals' engagement in it to

foster group spirit and uses pertinent questions to enable best group outcomes. Instrumental to making it work is also the set-up of the room, the individual and group writing of cards that are visible to everyone and integrated by them, and the ability to record what is said. This ensures broad participation, good reflections and conclusions along the way, as well as effective follow-up in the future.

The Strategic Thinking and Action module involves at least five distinct stages that we call OVIDA and uses the consensus workshop methods in a variety of ways, along with other processes for analysis, synthesis and catalysis:

1. Creating an Overview (O) of the current situation in its environmental and historical, internal and external context. This can be done in a smaller or quite broad framework depending on the needs discerned and outcomes desired, and over a brief or extended time period.
2. Shaping the Vision (V) of the anticipated practical accomplishments over a period of 3-5 years in response to the question: “What do we see in place?” This is followed by part
3. Naming the Issues (I) and underlying obstacles that become apparent in response to the question: “What makes these issues come up again and again or what is the underlying cause or the onion deep down at the root of the visible leaves?”
4. Crystallising Directions (D) describes the major forward strategies for addressing the root causes and moving around or through the obstacles and finally
5. Actions (A) name the details of implementation: who will be doing what, when and how and include the why in every step for orientation and motivation, as well as systems for monitoring or adjustment, for accountability and cooperation.

You can read more about ToP and ways it can help you from these books:

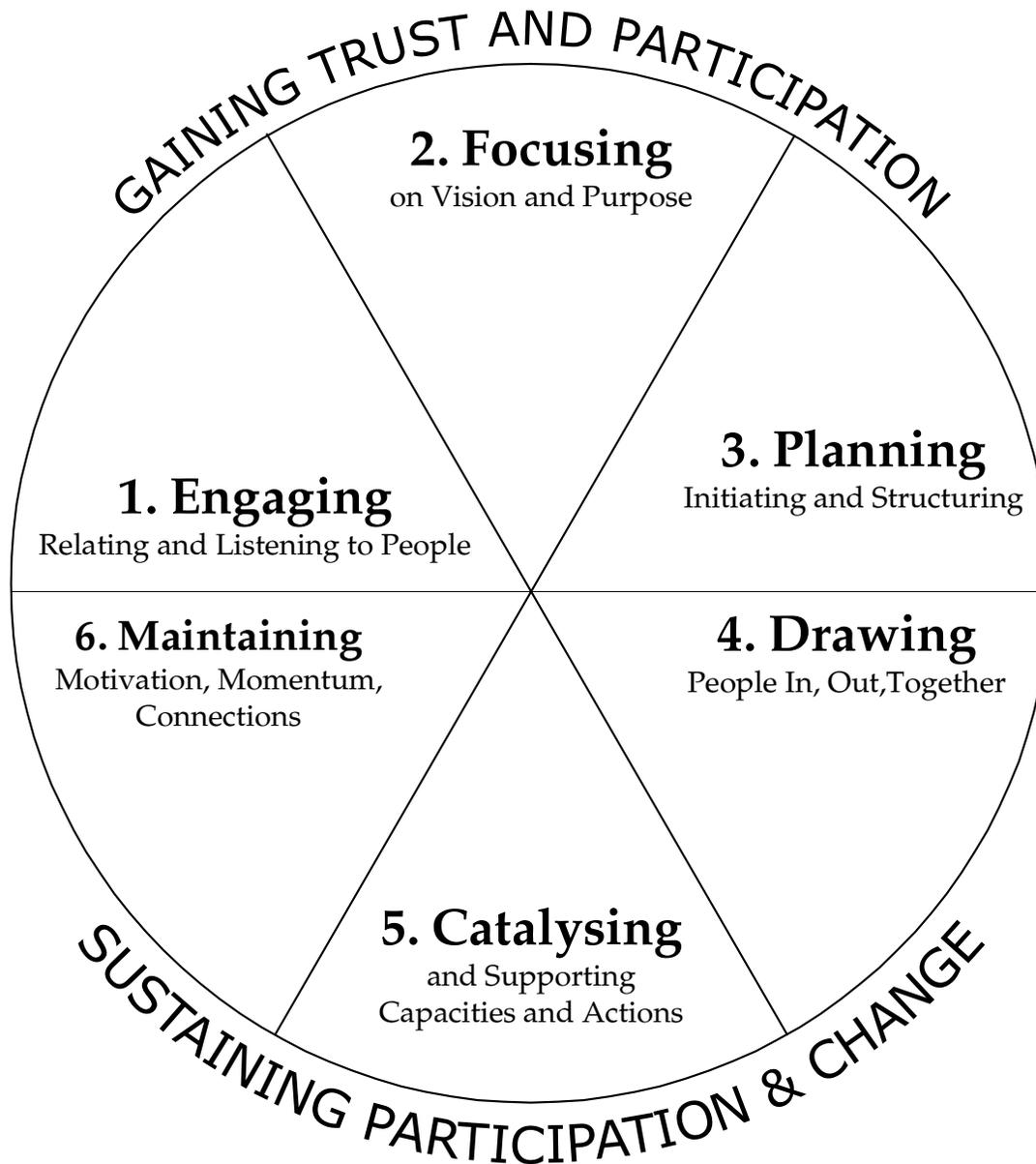
- Winning Through Participation- Meeting the Challenge of Corporate change through the Technology of Participation by Laura Spencer
- The Art of Focused Conversation- 100 Ways to Access Group Wisdom in the Workplace by Brian Stanfield
- The Workshop Book – From Individual Creativity to Group Action by Brian Stanfield
- The Nine Disciplines of a Facilitator- Leading Groups by Transforming Yourself by Jon and Maureen Jenkins
- The Facilitative Way – Leadership that Makes the Difference by Priscilla Wilson
- The Courage to Lead- Transform Self, Transform Society by Brian Stanfield

If you would like to learn more, you can call 02 9896 3839, write mail@unfoldingfutures.net, or download a course brochure from www.unfoldingfutures.net

Role of Facilitative Leadership

Releasing Group Energy -- Building Human Capacities

*Go to the people, Love them,
Start with what they know, Build on what they have
And when the work is done, Of the best leaders they will say
We have done it ourselves. -- Lao Tsu*



We can do it
We are in this together
We want to make it work for all

Not:
I can do it for you
I am in control
I tell you what to do

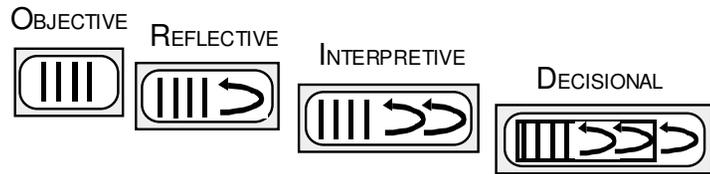
Keys to Facilitative Leadership

- 1. You can be a human being among other human beings, committed to people and the task, you do not have to be perfect, nor do they. Trust the people and trust the process.*
- 2. In everything you do focus on giving attention and respect, showing care and service, that is, in the way you prepare, greet, involve, listen and encourage participants and guide the meeting to fulfil its purpose.*
- 3. You want to enable people's motivation, creativity and cooperation to participate and give their best. Your own passion and responsibility along with humour and a light touch will be the best way to elicit theirs.*
- 4. People want to be free to make their own choices. They are willing to make common decisions if their own ideas and values are included. When decisions are avoided look for what feelings or values might block participants and get hidden matters on the table, with great sensitivity.*
- 5. People who seem "difficult" have just different needs and perceptions. They can make a great contribution if their concern is accepted and turned into a suggestion.*
- 6. Rules, guidelines and structures are there to support freedom and common ground, they don't work if followed rigidly. Honouring time and agreements is important and changes have to be negotiated.*
- 7. Most group participants want to make useful and meaningful things happen. Release this positive energy, acknowledging their unique contribution to the task and achievements of the whole group.*
- 8. Consider all three aims of a meeting: People will act on things if they have information and understanding (knowing), along with positive feelings and attitude (feeling) and some practical way and skill for implementing it (doing).*

Facilitation Essentials Checklist

Preparation	Set-Up, Welcome, Agreements
<ul style="list-style-type: none"> • Get enough information about the situation, the group (organisation, community, industry and purpose of the meeting (research, ask questions) • Determine expectations, needs, timeframes, possibilities in preceding dialogues • Clarify values and outcomes • Seek suggestions as to outcome, structure, settings etc. • Design a possible format and adjust according to further input received • Entice interest through invitation and appropriate information • Ensure the facility is appropriate for what is needed for the design of the session/s and meets logistical requirements (break-up spaces, equipment, whiteboards, proximity of workspaces, documentation, refreshments/lunch etc.) 	<ul style="list-style-type: none"> • Set up (and décor) the room and tables for maximum participation and connections • Create an enticing atmosphere (including informal welcome) • Do appropriate welcome and introductions • Set clear context on purpose, style, process and outcomes • Clarify your role as a facilitator (do's and don'ts) and possibly also their role • Reach initial agreements • Build a sense of excitement and commitment to what is going to happen and why it is needed or desirable • Ensure everyone is clear about the practical and logistical aspects of the session/s • Set a couple of guidelines for acting with each other, such as: respectful, open, listening, communication and mutual responsibility for time design, process and for good outcomes for everyone
Attention to Process	Achieving Results
<ul style="list-style-type: none"> • Find ways to get everyone to participate through verbal contributions and different activities • Carefully and intentionally ask questions that allow a flow natural group interaction, initially requiring easy and quick answers and more reflective later • Move carefully to more personal questions, that bring out people's different feelings and experiences, and then help them sort the data and draw conclusions for meanings and decisions or actions (see O-R-I-D). • Use various ways of collecting and distilling information and insights, including using large paper on walls with topical questions, table discussions (including World Café or Open Space etc.) • Make sure everyone gets a say (go around the room, especially once early on) and is heard • Practice and encourage listening, building on each other's insights, connect and summarise or ask someone to do it • Encourage the group to accept whatever someone says is initially as true for them and that the brainstorm of ideas can be discussed and later as needed (remind them of this if someone tries to change others' inputs) • Use body language and be comfortable with silence or staying in the background, for a while • Watch the dynamics of the group, respond to special needs and create a sense of ownership and fun 	<ul style="list-style-type: none"> • Establish early on (and refresh on the way) what the meetings needs and intends to achieve • Set the bar high and release passion and commitment • Trust the group and the process, and encourage the group to do the same • Accept what people say (without correcting or improving, unless necessary) • Affirm possible tensions or conflicts as natural and even necessary for achieving worthwhile results • Provide some categories or questions (and get suggestions) for working out more detailed decisions and implementation steps in groups or for afterwards • Ask for additions and improvements of initial decisions or proposals for action – what will make it work even better? • Acknowledge the achievements of steps on the way and the final results • Ensure a consensus (agreed best possible outcome) is reached and next steps are clarified to everyone's satisfaction • Ensure that documentation of the results is given to each participant for follow-up as soon as possible
Evaluation and Follow-Up	
<ul style="list-style-type: none"> • Find appropriate ways to celebrate individual and group achievements • Express thank-yous • Ensure enjoyable and meaningful evaluation, reflecting on the experience, what learned and future applications • Give some space for honest feedback and self reflection as well as strong affirmation of everyone's unique contribution to the group effort 	<ul style="list-style-type: none"> • Remind participants of the longer journey (Past- Present and Future) of their group/area of work and concern, both the gifts and challenges • Enable participants to determine their next steps as individuals and/or as a group • Follow-up on decisions made and results achieved and see what they might required or desire from then on

Introduction to the Focused Conversation (ORID) Method



A structure for effective communication that

- provides for meaningful exploration and dialogue
- broadens perspectives
- results in clear ideas and conclusions
- allows maximum participation and input
- activates individual reflection
- can be used effectively with large or small groups of people
- works well by itself or in combination with other techniques

HOW THE METHOD WORKS

A series of questions

- * enabling the focused collection and exchange of information and viewpoints
- * flowing in a well defined sequence
- * engaging participants in a four level process of group and self awareness:
 - O**bjective
 - R**eflective
 - I**nterpretive
 - D**ecisional
- * directing the thinking of a person or group toward conclusions and decisions
- * adaptable to most situations, tasks and groups

A natural thinking process

- ✦ based on the way the mind functions, moving from sensory stimuli and external data to reflection and action
- ✦ allows people to become conscious of how their thinking can hinder or release cooperation and action
- ✦ produces group reflections and decisions based on all the available information and perspectives
- ✦ integrates rationality and intuition
- ✦ can be learned easily, yet calls for practice and commitment to allow for depth and ease

ORID METHOD OVERVIEW

OPENING WELCOME CONTEXT

Set the stage
Entice interest
Name the topic,
purpose

RATIONAL OBJECTIVE

What will people **know** as a result of this?

EXPERIENTIAL AIM

What will be people's **sense** of themselves and the situation at the close?

PRACTICAL RESULT

What is the desired product, the **tangible** outcome?

CLOSING COMMENTS REFLECTIONS

Summarise results
Draw experience & topic together
Ask "What's different now?"

OBJECTIVE OBSERVATIONS INFORMATION

GET THE FACTS
DRAW ON THE SENSES
FOCUS ATTENTION
EXPAND AWARENESS

Questions on this level

- clarify the situation—what happened, when and how
- use sense words like see, hear, touch, smell, taste
- identify players, events, resources, scenes, information
- invite people to share images and memories

REFLECTIVE FEELINGS RELATIONS ASSOCIATIONS

EXPLORE THE VARIETY OF PERSONAL RESPONSES
BRING OUT EXPERIENCES AND CONNECTIONS

Questions on this level

- illuminate what people feel toward something—what angers, intrigues, delights, frightens or frustrates them
- articulate associations and examples in their lives or in society

INTERPRETIVE VALUES, MEANING LEARNINGS

NAME THE ESSENTIALS
DISCERN THE HEART OF THE MATTER

Questions on this level

- elicit the significance people attach to the subject
- highlight layers of meaning and purpose
- point towards the personal and corporate story
- move towards a summary, choices and conclusions

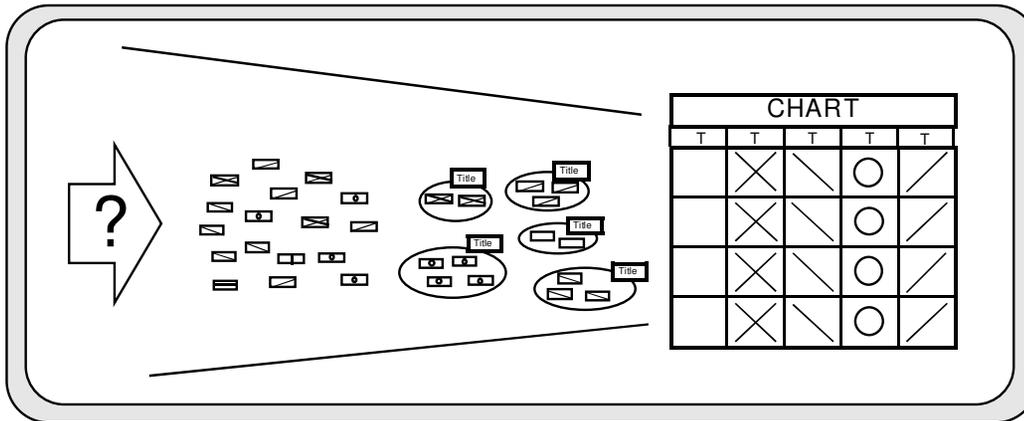
DECISIONAL IMPLICATIONS RESOLVES, ACTIONS

LAY OUT OPTIONS FOR ACTION
DECIDE WHAT WILL BE DONE

Questions on this level

- invite ideas for implementation
- enable the group to come to a consensus on action
- lead participants to take responsibility for the future

Introduction to the Consensus Workshop Method



Use the workshop method when you want to ...

- stimulate creativity and new energy in a short amount of time
- catalyse integrated thinking and planning that make use of people's rational and intuitive capacities
- build practical team consensus and decide on action
- infuse a group with a sense of responsibility for implementation

5-Step Workshop

CONTEXT

BRAINSTORM

Generating
New Ideas

ORGANISE

Discovering
Relationship

NAME

Discerning
Meaning and
Consensus

REFLECT

A Structured Experience ... with 5 Key Steps

Context	Setting the Stage
Brainstorm	Generating Ideas
Organise	Forming Relationships
Name	Discerning the Consensus
Reflect	Confirming the Resolve

Materials: Paper/cards, texters, blue tack, wall space
Time: 20 min - 3 hrs

WORKSHOP METHOD OVERVIEW

Topic/Focus Question: _____

CONTEXT

Setting the Stage

1. Highlight the topic/question.
2. Clarify the intent and outcome.
3. Outline the process and timeline.

RATIONAL OBJECTIVE

What does the group need to **clarify**?

EXPERIENTIAL AIM

What does the group need to **experience**?

PRACTICAL RESULT

What does the group need to **do**?

BRAINSTORM

Generating New Ideas

1. Brainstorm individually on cards
2. Individuals select their 3 best ideas.
3. Facilitator collects, has read aloud and puts up cards from all members of the group (one by one).

ORGANISE

Discovering Relationships

1. Form pairs of cards intuitively to start grouping process.
2. Develop clusters by adding cards to pairs. Collect all cards (unless time is short and group is large).
3. Quickly give each cluster a 1-2 word initial working title. Check for consistency in each cluster.

NAME

Discerning the Meaning and Consensus

1. Talk through a cluster - "What are we saying here?" "What is our insight?"
2. Give the cluster a 3-5 word title that captures the essence of all cards.
3. Repeat for the remaining clusters (in subgroups if appropriate). Check for improvement and consensus.

REFLECT

Confirming the Resolve

1. Create a design to express the consensus, relating the components together .
2. Discuss the significance of the results: "What have we discovered here?"
3. Reflection and next steps: ("What if...," "What now...?" "What later...?")

ACTION PLANNING WORKSHOP

Topic/Focus Question: _____

RATIONAL OBJECTIVE

To discern the necessary action steps

EXPERIENTIAL AIM

To feel I'm part of a "dynamic team"

PRACTICAL RESULT

Comprehensive calendar of actions

CONTEXT

We will be creating an Action Plan that will... (Create a celebration, organise a campaign, or _____)

Outline the time and process.

Set the stage.

Rehearse what has already been decided...

- Who?
- What?
- When?
- Why?
- Where?
- How?

List on a sheet of butcher paper

VICTORY

1. VICTORY

Ask for particulars about the completed project. Imagine the day after. What did you see/feel/hear? Put responses in a circle on a flip chart.

2. REALITY CHECK

List strengths and weaknesses in our current situation. Talk through potential benefits and dangers which would result from succeeding with this course of action. Make notes on the flip chart

3. COMMITMENT

Read through it all. What does the reality check reveal about the victory? Write a statement that summarises the commitment. Put responses on a new flip chart page.

KEY ACTIONS

1. BRAINSTORM

Individuals brainstorm 5 actions. Get at least two from each team member and place on the board or wall.

2. ORGANISE AND NAME

Group the actions into several clusters and name each according to those which could be done by one task force.

3. GROUP SELF SELECTS

Each person decides an action cluster (arena) they would like to work on. Each small group decides the accomplishment their task force will create in order to achieve the overall victory, and the steps which will bring it about. Feel free to use or discard any of the initial action cards

CALENDAR AND ASSIGNMENTS

1. ACTION TASK FORCE PLANNING

Write the accomplishment and date at right end. Identify the launch event and place it on the left. Place the other steps to the accomplishment in a row from left to right. Write a card for each task for the main calendar.

2. TASK FORCE REPORTS, CALENDAR, COSTS AND COORDINATION

Task forces put their cards up on the calendar. Review and coordinate activities across task forces.

3. TEAM ROLES, OVERALL COORDINATION

Agree on overall coordinator and leaders for the task forces. Estimate the overall cost to achieve victory.

REFLECTION

What stands out for you from our time together?

Where do you sense we had a breakthrough?

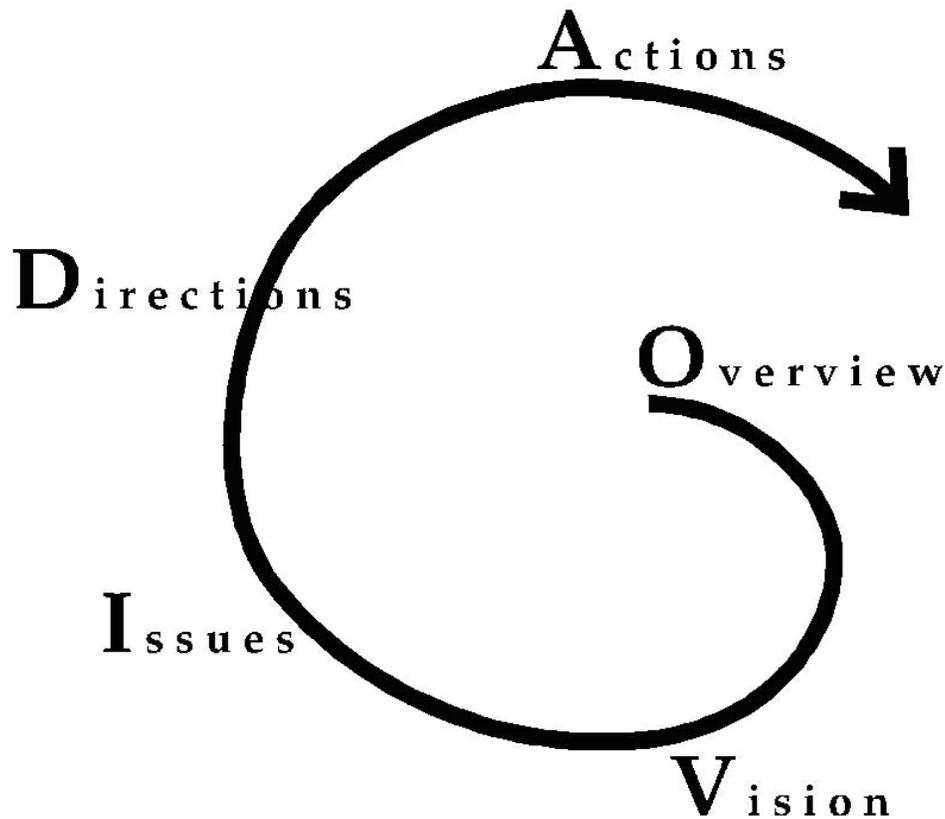
What are you looking forward to?

Create a catchy title, campaign name or visual image of the task ahead.

What will be the significance of accomplishing these actions?

What do we need to do next to make this all work well?

Strategic Planning Process (OVIDA)



OVERVIEW

Reviewing the **History and Story** of the group/organisation/community. This includes work with Purpose, Mission and Values; Past, Present and Future Developments related to the sector at large (locally, regionally, internationally).

VISION

Creating a concrete picture of a **Future** worth striving for-- building a Shared Vision.

ISSUES

Analysing the **Obstacles** in the way of pursuing the vision-- the underlying Contradictions in seeing and doing things that endanger the realisation of the desired future.

DIRECTIONS

Discerning the key **Strategies** for overcoming the obstacles, generating new possibilities and moving towards the vision.

ACTIONS

Designing the **Systems, Programmes and Projects** to implement the strategies.

PLANNING PROCESS - A SUMMARY OF 3 WORKSHOPS

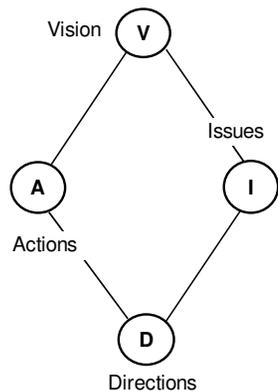
Focus Question: **“What do we need to do so our organisation/community stays healthy and vital?”**

CONTEXT

Setting the Stage

State the purpose and focus question.

Put up and talk through a diagram of the planning process creating anticipation of real participation.



RATIONAL OBJECTIVE

To build shared knowledge and consensus on vision, issues and directions.

EXPERIENTIAL AIM

To create a sense of momentum and ownership for the plan.

PRACTICAL RESULT

To have a clear statement of vision, issues and directions guiding future action.

VISION WORKSHOP

Focus Question:
“What are your hopes and dreams for the future of our organisation/ community?”

- Brainstorm hopes and dreams.
- Organise hopes and dreams according to similar accomplishment.
- Name hopes and dreams
- Create a chart or image to hold the elements of the vision and reflect.

ISSUES WORKSHOP

Focus Question:
“What is blocking us from realising our vision?”

- Brainstorm blocks.
- Organise blocks according to similar underlying cause.
- Name the blocks.
- Create a chart or image and reflect.

DIRECTIONS WORKSHOP

Focus Question:
“What are the new directions we will take to overcome the blocks and move towards our vision?”

- Brainstorm new directions.
- Organise the directions according to what can be done together(similar intent).
- Name the new directions
- Create a chart or image and reflect.

REFLECT

Confirming the Resolve

What do you remember from our planning together?

What new insights have we had?

What is the significance of these plans for our organisation/ community/group?

We are now ready to create an action plan for each new direction.