Chapter 5 Facilitation – Creating Mastery

By Sylvie Lapointe
With stories from Moyra McWilliam and Lloyd Legare

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

Once upon a time, there was a fairly inexperienced but very enthusiastic process facilitator who received the dreaded call: "We need you to facilitate a strategic planning exercise with our group. We have tried three times to get a group consensus on a mission statement and a vision for our newly reorganized group, but we have failed. Someone told us you could help." GULP – they tried three times and they think I can help??? Well nothing ventured, nothing gained. I met with the newly-appointed director, put on my news reporter hat and asked the five journalistic questions: WHAT have you tried already? HOW did you approach it? WHY has it not worked in your opinion? WHEN was your group reorganized? WHO is part of your group now? WHERE is the resistance to the strategic planning process in your group? The answers provided some insight…

Here is the story that started evolving: the group had been reorganized a little over a year ago. In essence, two small divisions were added to an already existing, well-established program. The three previous attempts focused on word smiting and rubber-stamping the existing mission and vision statements developed three years earlier; the two new divisions were resisting because they could not see their contributions represented in the proposed wordings. My task for this one-day session was to reach an agreement on a revised mission and vision statement. This could only be done by creating a safe environment where diverging opinions could be voiced and respected, and where common ground could be identified in order to reach consensus. But how to do this?

I had loads of experience with group dynamics from my background in counseling and social work, so I felt fairly confident that I could deal with any people issues that would arise. I felt weak, however, in process tools for strategic planning. This led to my first lesson: don't be afraid to ask for help. I asked my friend Tony Nash, a real pro at this stuff, for a crash course on strategic planning. He shared a few simple tools and novel approaches. I asked my colleagues Kathryn Sullivan and Joan McCarthy to be sounding boards for my process design ideas. They gave me great advice and, more importantly, acted as my cheerleaders.

Well, I did what the books say you should do: prepare, prepare and prepare. I spent a lot of time fact-finding, researching, planning, designing and redesigning, and came up with what I thought was a good process. Then, the little voice started speaking more loudly: "Who do you think you are? You have never led a strategic planning session before – you can't do this." Even more jarring was the voice saying that, since these people are all scientists, they wouldn't go for the touchy-feely granola-type facilitation stuff that you do. They will expect you to be logical, analytical and serious. They will expect you to have fancy overheads with bar graphs and pie charts. They will want to see your credentials. Is your process design solid and tested? Has it been peer-reviewed? Has it been published? In which scientific journal? “OK! Enough! This is silly,” I said to the voice in a less-than-convincing manner. And this was my second lesson: dare to dance on the edge of your comfort zone – it`s the only way to learn and grow.

The big day arrives. I arrive early to set up the room and greet participants. I am still very unsure about being able to help this group reach consensus on a mission and vision statement, but I am going to give it my best shot. I see some curious glances around the room as I hang a huge piece of blue felt on the wall, lay out clear plastic envelopes with Velcro, blank sheets of paper and Mr. Sketch markers that smell like fruit. I get puzzled looks when I begin the session by asking everyone to solve the ‘9 dots’ brainteaser exercise to stress the importance of thinking outside the box. Eyebrows go up when I flash a picture of two people pushing and one person pulling a wooden cart on square wheels (Scott Simmerman, 2001). I launch into a mini-teach on the subject of ‘what is a mission statement and vision statement?’ When I ask participants to tell me how their organization is like or unlike this cart on square wheels the first responses are hesitant and very straightforward. Slowly, people loosen up and start having fun with this exercise: their ideas are more creative and humorous. Then it happens: laughter! This is a third lesson: when people laugh together they are more likely to listen to each other. Laughter helps build a sense of connectedness.

Fast forward to later in the morning where I a participant played the “Vanna White” to a modified game of “Wheel of Fortune”. With the active participation of everyone in the room, she moved Velcro envelopes containing key words around on a giant felt board to compose a mission statement. When we finally reached agreement on the final wording some people spontaneously jumped up and gave each other high fives. The vision statement was a breeze after that; in fact we finished an hour-and-a-half early!

In the end, I didn’t use fancy overheads with bar graphs, and I didn’t give a theoretical presentation of the organizational benefits of having a Strategic Plan. Instead, I decided to be myself. I came up with an approach that I was comfortable with and a design that would deliver the goods, all while attending to people and relationships. This may be the ***most important lesson of all***: be yourself! Don’t pretend to be someone you are not just because you think people (or the culture) expect you to be a certain way. Inject your own style and give your own flair to your facilitation. If you are comfortable with your process and have fun doing it, chances are that the group will too.

My Story

It was a nice summer day in 2000 and I was sitting in the cafeteria chatting Bob Chartier, a fellow public servant and very colorful character. Health Canada’s DMC had agreed to try something new during the opening plenary at their annual EX Retreat: an Open Space. Bob Chartier had agreed to teach me how to do it. We hit it off right away, and as we talked we realized that we had a lot in common, including a shared passion for changing the culture of the Public Service.

The Open Space that we hosted with over 400 executives in January 2001 was a resounding success. Participants were upbeat and animated. The Deputy Minister was so pleased that he high-fived me every time I met him in the hallway! A few months later I received a phone call from Karen Bonner at Veterans Affairs. She was organizing a week-long retreat on a dude ranch in Cochrane, Alberta, in the foothills of the Rockies. Bob Chartier had given her my name. She started explaining her vision for the week and I knew right away that I had to be part of it. It was a life-changing experience. I met some people with whom I deeply connected and who are still dear friends today: Karen Bonner, Bob Thompson, Catherine Auger, Paul Lefebvre and, of course, Bob Chartier. It was the beginning of my involvement with the National Managers' Community. Since the Cochrane retreat in June 2001, we have hosted Learning Organization retreats in every province and have started building a cross-Canada network of 600 Learning Organization practitioners in over 30 federal departments. I also started integrating into the retreats a half-day workshop on basic facilitation skills. The workshops were well-received and provided the impetus for writing the book *Facile.*

The Business Model of Facilitation

Bob Chartier had been travelling across Canada for several years teaching his tools of the trade to the Public Service. His 2003 book, *Tools for Leadership and Learning: Building a Learning Organization*, now in its third edition, describes over 40 tools for working with groups. It occurred to us that what was missing now was a step-by-step guide to help practitioners build their facilitation practice. We needed a guide to answer the following question: How to best assess the business needs, design an agenda and facilitate a process to help achieve organizational goals while paying attention to people dynamics? It is a skill and an art form.

Facile… the art of cultivating leadership moments through facilitation (Lapointe & Chartier, 2004) was written as a reference tool for both facilitators and managers. *Facile* applies a business model to enhance the application of facilitation tools, techniques and practices, thereby allowing people at all levels of the organization to step up, take action and be agents of change.

Managers have enough to do without having to worry about facilitation, right? One can imagine saying: "Let's just hire an outside consultant to deal with these 'touchy-feely things'. I just want to get the job done – and quick!" Or, "Why should I learn about facilitation? It only comes in handy for these big annual events with all-staff or large-scale consultations. Someone else can do it."

I was delivering a workshop at a national managers' conference in Regina, titled *Facile: Facilitating Teamwork to Achieve Your Goals*. One participant commented that "this workshop was not what I expected. It was about facilitation tools and techniques… I don't know what facilitation has to do with effective teamwork?" Maybe the individual was looking for a recipe that could be applied in the same way, in any circumstance, with any group of people that would guarantee a successful outcome? Whereas what I offered was a step-by-step business model for leading groups, with a series of key questions and some facilitation tools and techniques. It was not a recipe, it was a process.

I often say that, no matter how you look at it, an organization is simply a group of people working towards the same goal. The organization is only as successful as the strength and quality of the relationships between people. And how do people build relationships? Through meetings and conversations: bilateral meetings, team meetings, divisional meetings, cross-functional meetings, communities of practice meetings, departmental meetings or stakeholder meetings.

The work only gets done if people have an effective way of coming together, face-to-face, to discuss *what* needs to be done and *how* it needs to be done. Facilitation allows for powerful meetings by ensuring that you have a *Purpose*, a *Plan* and a *People focus* in all meetings. Regardless of whether you are a team leader, a project manager, a member of a Community of Practice or even a Director, facilitation techniques can help make your meetings worthwhile and meaningful.

The following is a summary of some of the key points in *Facile* as a way to set the context for the practitioners' stories that will follow.

The Practice - The three P's: Purpose, Plan and People

Purpose

Firstly, the purpose of the meeting needs to be crystal clear. Why is the meeting being called? What do you want to accomplish?

The objectives of the meeting and how success is defined are the guideposts that will determine which process and tools are needed. Once the objectives are clear, you can work your way backwards to determine what needs to happen and in what sequence.

The Call

It all starts when you receive a call for help: "We've got an event planned and we need a facilitator." The first thing to do is embark on a fact-finding mission using the five journalistic questions:

- *When?* Are you free during those dates? Will you have sufficient preparation time? Will you have time afterwards to physically and mentally 'unpack' and get ready for the next gig?
- *Where?* On-site or Off-site? In town or on travel status?
- *Who?* An intact team? Division? Program? Branch? Department? Interdepartmental?
- *What?* Team building? Strategic Planning? Decision Making? Problem-solving?
- *Why?* The rationale for the event and the timing**?**

Manager's Tip

As a manager, making the right call at this stage requires that you know your:

- Objective for the meeting
- Desired outcomes
- Mandate and resources of the project
- Options for facilitation help
- Your own leadership role and level of commitment to the project

The Planning Group

If you have chosen to accept the mission at hand, you need to go into serious preparation and planning mode early in the game. In the preparation phase you continue to clarify the purpose of the event by systematically exploring everyone's understanding of what needs to be accomplished. By 'everyone' I mean the client who made the initial call, (or the boss who made the initial request), the members of the planning committee, the decision makers, the stakeholders and even the participants.

When you meet the event planners you will play many roles:

- *Journalist*: Asking many questions. Listening intently. Making links. Looking for a scoop.
- *Strategist*: Getting clear on the objective and proposing approaches that will get the job done while establishing or enhancing strong relationships.
- *Advisor*: Using your experience in group dynamics and knowledge of organizational development to suggest a course of action.
- *Change Agent*: Knowing when to go with the flow and when to push the envelope. Challenging the status quo. Suggesting new possibilities.
- *Counselor*: Coaching your client. Supporting the group through challenging times.

Manager's Tip

Both you and the facilitator need to know:

- Who exactly is the client? Is it you or someone you report to?
- What will be your role during the event? An observer, a full participant or a post-session decision-maker?
- What is the real purpose of the event? What would success look like for you?
- What are the participant's expectations? What are your supervisor's expectations?
- What are the logistics required for this session? Must have? Nice to have? Negotiable? Non-negotiable?

Plan

Now that you have a good idea of what needs to be done and for what purpose, it is time to pay attention to the second element of leading ‘powerful meetings’, that is, *the plan*. At this stage, ask of yourself: “How can we best achieve the goals we have set out for ourselves? What methodology will we use? What process is best suited, and why? What are the critical questions we need to ask of the group? How do we ensure full participation?

Your goal is to design an agenda and develop a detailed road map that will ensure your client will reach their destination. This is your opportunity to dig deep into your tool kit of facilitation techniques and processes, add a dash of creativity and a good dose of strategic thinking, and come up with a plan to get the job done.

The Design: the Yin and Yang

A good design is a bit of a balancing act. I like the Yin and Yang symbolism that comes from eastern philosophy. The symbol of yin and yang is a circle with two colors, black and white, in equal proportion, equally balanced. The colors represent two complimentary yet opposing qualities of life energy. When there is more of one, there is less of the other, a situation where things become out of sync. The goal is to achieve balance between the two. In my opinion, this provides an example as to how facilitation sometimes resembles more of an art form than a set of skills. The facilitator must know when things are out of balance and be able to readjust the focus from business to people, from action to relationships, or from left brain, logical and concrete activities, to right brain, creative and introspective activities.

The question of balance must be addressed during the design phase. It is also a big consideration the day of the event, when you must read the signals from the group you are facilitating and readjust accordingly.

A good design achieves:

1. Balance between the business of the meeting and the people dynamics;
2. Balance between plenary and small group work;
3. Balance of information sharing, new learning and dialogue;
4. Balance of methodologies and approaches to suit personality types and Learning styles.

Manager's Tip

One of the most common mistakes we make is to overload the agenda. Our intentions are good – we want to take full advantage of the occasion and feel the need to inform, consult, train and inform participants again. The agenda is divided into 15-minute time slots – there may even be presentations during social times at breakfast, lunch and supper! Not to mention the committee meetings that are often tacked on to the beginning and the end of the day to take advantage of face-to-face time. Unfortunately, the end-result is that there is hardly a minute left to chat with your colleagues, find out what's happening in their world, and make critical business links and connections.

Be clear about what you want to accomplish and try to identify no more than three objectives per session. Good facilitation can significantly increase the effectiveness of group work. Ask your facilitator to suggest processes and tools that will help you to achieve your goals.

The Contract

This phase of the process ensures that everyone is on the same page regarding the purpose and the plan for the event. Whether it is an oral or written confirmation, formal or informal, it is necessary to confirm the objectives, the outcomes, the design (process and methodologies) and the roles and responsibilities of all players.

Manager's Tip

A contract helps you manage from three main points: clarity, accountability and commitment.

The Set-up

Rooms can make or break an event!

No one looks at a room quite like a facilitator. A few years back I was part of a cross-country team of facilitators leading a large-scale consultation for a voluntary organization. I was asked to facilitate a bilingual session in a small town in New Brunswick. It wasn't possible to travel there prior to the event to look at the room and identify logistical needs; instead, an onsite contact person offered to help. I asked him to describe the room to me. With a question mark in his voice, he hesitantly replied, "Well…it is a large room with tables and chairs that should accommodate the number of people we are expecting." I responded: "Yes, I understand that, but can you describe for me what the room really *looks like*?" I wanted to know its shape, the number of windows, the available wall space and even of the type of walls? Wallpaper or painted? Typical present-day office walls, or walls of an older building, made of wood or stone? I could almost hear the guy's thoughts after I finished: 'This is an odd lady – why is she asking me all these weird questions about the room?' There was an uneasy silence and then a hesitant, "Huh? I'm not sure I understand what you mean. This room is in a ski chalet and it looks like a typical ski chalet." 'Yikes,' I thought to myself, 'this could pose some logistical challenges!' As it turned out, three of the four walls were windows the size of patio doors (a fact which limited available wall space and created a lighting / temperature issue). The remaining wall was made of wood logs (!); there also was a large floor-to-ceiling fireplace right smack in the middle of the room (not great for a room set-up that ensures that everyone can see the front of the room!). I bet some of you are chuckling as you are reading this story – maybe you can even sympathize because you have found yourself in similar logistical conundrums…

Here are a few tips, tricks and questions to ask with respect to room set-up:

1. Ask for a room that can accommodate 1.5 times the number of people you are expecting. This will allow room to move for small group work and the use of flip charts at tables.
2. Visit the space prior to the event or, if that's not possible, ask for a floor plan
3. Wall space: Are there more windows than walls? Are there frames on the wall that limit wall space to post flip charts? Can you things be hung on the walls or is there a hotel policy against sticking anything on the walls?
4. Tables or not? Theater style? Horseshoe? Islands? Large circles of chairs?
5. Logistics: Does capability exist for audio-visual presentations and/or a translation booth? What about food, handouts, decoration / atmosphere…?

Manager's Tip

This is an opportunity to become a bit of a pioneer within your organization by resisting the traditional way of doing things and by daring to try new ways of bringing people together to work. It is an art to create organizational space for thinking, learning and creativity and it is as important for an all-staff retreat as it is for everyday office work. How do you, as a manager, create space for your staff to have open conversations, be innovative in their thinking and get a sense of shared commitment?

People

Let's move on to the third 'p' in powerful meetings – people focus. Now, to be clear, a *people focus* is of course present throughout this whole process; from the initial call, to the planning of meetings and the contracting phase, people skills are of key importance. People skills are even more important on the day of the event. The key to being a good facilitator is having the ability to maintain neutrality and objectivity in regards to the content while bringing out the passion and commitment of people.

Facilitation is not just a job, it's a way of *being* as well as a way of *doing*…

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

I agree with Bob Chartier, who often says that we have mislabeled the hard skills and the soft skills of management. We refer to things like budgeting, project management, strategic planning, and marketing as 'hard skills'. When you think about it, those are not the hard skills at all: these skills can be learned in the classroom or from books, and there are lots of reliable tools and templates for doing it right. But how do you develop people skills? Is there a recipe? Is there a step-by-step process? People skills are in fact the hard skills, not necessarily because they're difficult to master (and they are) but because without people skills it is difficult to get the job done efficiently. Remember, the strength of an organization lies in the quality of relationships between people. People skills will ensure the existence of a motivated, creative and dedicated work force free of conflicts and destructive water cooler conversations about "what's wrong with this boss, this job, this place…"

The Show

Back to our story now. The day of the event has arrived. You have done your prep work, you have a solid design for the day, and you finally find yourself in front of a group of people. Now what? Depending on your perspective, the great thing about facilitation is that no matter how much preparation you have done, there is always an element of mystery and surprise. What will the group be like? Will they be willing to go along with the process? Will some old historical conflicts re-surface? Will new ones emerge? Will participants be in a cooperative mood or will they be in the mood for a debate? Do they want to have fun while they roll up their sleeves to work, or will they be all work and no play?

This is where the very best quality of a facilitator comes into action: the ability to think on your feet. Your task is to find a way to get the job done while working with the group's energy. This means that you have to be willing to tweak (or even radically change) the process in order to address the group's needs. I use the analogy of a travel agent. As the travel agent, the facilitator has put together a trip plan to get the group to its destination. However, on the day of the event, the group can decide to follow the plan to the letter, or instead take the scenic route, even decide to go full speed on a different highway. They may even want to change the destination on the way! In the facilitation world we use this catch phrase: the group owns the process and the outcomes. The facilitator is merely their guide on the journey.

There is no magic pill to develop strong people skills. Despite that, here is a bit of advice to consider:

- Develop your emotional antennas to help support rational decisions.
- Trust your instincts: if it doesn't feel quite right it probably isn't.
- If in doubt, call for a time out and chat with colleagues, your client and / or participants to either confirm your intuitions or to enhance your read of the situation.
- Know your strengths and weaknesses in terms of people skills. Strive for balance (yin and yang). Work with a partner who has complementary skills.
- Ask colleagues for constructive feedback after an event: What can I do more of? Less of?
- Observe. Be curious. Learn about personality types and learning styles.
- Be a model. Paraphrase, mirror, summarize and ask open-ended questions to check for understanding and encourage participation.

Manager's Tip

It is an art to know how to participate in full dialogue without making others feel that you are pointing the way for them but rather discovering the way with them. Decide how you want to present on the day of the event.

Managing is a bit like parenting: you don't realize how much of an influence you are until you hear your children repeating your personal maxims or displaying some of your mannerisms or trademark behaviors. Choose to model the way with your staff…

The Follow-Through

The event was a resounding success. People left feeling satisfied and happy. End of story, right? Not quite.

In order for an event to have real meaning and value, the good ideas that result from it need to be implemented. The question by which you can measure true success is "Did we get to action?" The follow-through builds trust and the credibility of all players.

You have a role to play in ensuring that there is follow-through on the outcomes of the event:

First, at the end of the day, make sure that the flip charts are collected and that someone is responsible for typing them up and sharing them with the group.

Second, throughout the planning and preparation phases for the event, you have been having conversations with your client about the next steps. Different outputs are expected from different types of meetings. For example:

1. *Information-sharing meeting*: Distribute PowerPoint presentations and background materials.
2. *Consultation meeting*: Distribute “As Was Said” report to participants, send final report and provide regular updates on the implementation plan and any resulting policy / process changes.
3. *Planning meeting*: Distribute resulting Action Plan and set-up implementation committees. Have committees provide regular update reports. Revisit the plan and evaluate progress.
4. *Decision-making meeting*: Send e-mail confirming decisions taken, accountabilities and timelines. Give regular update reports.

Third, in order to help maintain the momentum, you may want to provide your client with ongoing support by calling to check-in at regular intervals, offering process facilitation advice or even coaching if they request it, and maybe even facilitating other events down the line.

Manager’s Tip

Are you aware that it is usually easy to fulfill one-third of all recommendations? Another third of recommendations typically require more focused and deeper work before they are put to action. The final third are usually not really possible for financial, political or legal reasons. How do you intend to process the outcomes of the event? How will you communicate to participants the progress that has been made to date? People will measure success by the amount of action that resulted post-event.

Taking Care

I will go out on a limb here and assert with great conviction that all facilitators are caring people: they want to help. (Being a facilitator myself, I will admit that I am a bit biased – but I still think this is a grounded and valid assessment.) Wanting to help is a facilitator’s great quality, but it can also be a fault at times. How so? Because of our great desire (and maybe even our *need*) to help others, we tend to find it difficult to say ‘no’. We may say ‘yes’ even though our schedules are jam-packed and our batteries are low. And so we are in danger of over-committing and, dare I say it, burning out.

Because facilitation is as much about being as it is about doing, it is very important that you take care of yourself:

1. Keep learning: take workshops, read books, reflect on lessons learned and keep a learning journal.
2. Be a teacher: the best way to learn something is to teach it to others.
3. Feed your soul: whether you get a kick out of sports, art, cooking, gardening or just being with your family and friends.
4. Know your strengths and weaknesses.
5. Practice saying “NO”.
6. Join a Community of Practice so you can learn from others who work in this field.

Taking care of the organization that supports your work is another way of taking care of you:

1. Build internal and external networks.
2. Promote the benefits of facilitation through newsletters or ‘lunch and learn’ sessions.
3. Work with management and front line to raise awareness and garner support.
4. Challenge the mental model that outside expertise is better

Manager’s Tip

We hear it all the time and all over Canada: being a manager is a tough job. You are squeezed between the changing priorities of senior management and the operational challenges of front line work. It’s critical that you take time to refuel and re-energize.

Is your life all work and no play? What gives you energy and re-ignites your passion and enthusiasm? How do you make time for this?

On the work front, reflect on what is needed to enhance your managerial strengths and to improve your resources and skills in weaker areas. Then take charge and write up a learning plan and a strategic plan for yourself.

Do you allow yourself to say: I don’t know? What do you think? Will you help me? I need some time?

Connect with colleagues in the same line of work. You will be pleasantly surprised when you find out that you're not alone with those challenges, frustrations, and fears. Also connect with other professionals who can give you a different perspective or who can lend a helping hand with planning, managing people or even…facilitating group work!

Stories from the Community

Bob, Karen and I were sitting in a boardroom one cold fall day, working on a mission statement, vision and strategic plan for our work. We were sharing stories and comparing notes, trying to practice what we preach. Bob was describing his leadership work at Royal Roads University in British Columbia, where students are encouraged to bring forward a breakthrough project and apply what they learned in real time on a real issue. I was explaining an approach I had used for a two-day facilitation course I had led with a group in Halifax, Nova Scotia. I had asked my client to bring three real facilitation requests to the workshop from his organization, and to find two volunteers willing to play the role of client. Throughout the two-day training session, participants played the role of "process facilitation consultant groups" and met with their role-play clients to clarify the facilitation needs, design an agenda and arrange a contractual agreement. By the end, my client had three draft designs in hand for use in facilitating real events within his organization.

This is what we call "action learning" in adult education lingo.

Bob, Karen and I each commented on how our interventions with clients had been enriched through our exposure to one another's areas of expertise. We began to systematically integrate these three areas of expertise in an action learning model within our work, which subsequently grew and expanded. This illustrates a basic fact about what happens when people learn in a supportive and dynamic environment such as a community of practice. Pretty soon, even the teachers are learning from the students. Read on for some practitioners' stories.

Good Things can Happen When you Dare to Push the Envelope by Moyra McWilliam

What great memories I have of September 2003, when I spent an amazing week in Westport, Ontario learning the Chartier-Lapointe tools of the trade.

I have been very fortunate since that time to have had the opportunity to put some of the tools into practice. I have co-facilitated two ***cafés****, the first of which was for a team of 25 employees. We decided on an Italian theme: red-and-white chequered tablecloths, a few Chianti bottles as candle-holders, Andrea Bocelli playing in the background and of course, lasagna and garlic bread for lunch! Particpants' reactions were priceless as they came into the meeting room! There was a great deal of energy and motivation for the task at hand, which was to create a plan of action for the upcoming year.*

The theme for the second café was very much the opposite: a sports bar! (Root) beer in jugs, bowls of beer nuts, popcorn on the tables and my kids' sports paraphernalia strewn about. There were 35 participants (team leaders, managers, assistant directors and a director) chosen to represent their 180 colleagues. The purpose of the day was to find ways to promote learning to the management group. We generated ideas in the café and *then used the Challenge Wall to test them out. The outcome was the creation of five working groups, which followed up with the design of an orientation session and a soon-to-be-launched mentoring program.*

Another tool, called 'the 5 Whys', was used with a group of mid- and senior-level managers during a strategic planning session. It was a very delicate situation as the discussion centered on the relocation of workload and the possible elimination of several participants' jobs! Although emotions were running high, this tool helped participants to resolve issues in an objective way by helping them to see the big picture. By the end of the session they saw the problem in an entirely new light.

I was asked to help a team of 30 front line supervisors learn to hold more productive meetings. For several months, team meetings had been unproductive at best, screaming matches at worst. I used a modified ***Team Charter model*** *that helped the team identify their values, establish a code of conduct and protocol, and outline roles and responsibilities for the chair and participants. A few hitches notwithstanding, the general sense is that meetings are back on track and people now remember why they started having them in the first place!*

In another case, I facilitated a ***Talk Show*** *for a 70-person management team. Initially, organizers were concerned that guests would be ill at ease if they didn't have prepared answers and that, as a result, they would appear unprepared to conference participants. After some discussion, the organizers were eventually convinced to give it a try. The guests were briefed and felt comfortable once they had an idea of the sort of questions they would be asked. We found some risers to use as a stage, set up a small couch, a couple of comfy chairs, a small table, plants and some wireless mikes. When it was done it looked as good as Oprah's set!*

While very excited to try this tool, I was a bit nervous too. What if there were moments of …silence? Luckily, I had great guests who not only answered my questions but were actually heard to say: "Would you mind if I asked Joe a question?" and "Could I add something to what Sue said?" Whew! The feedback from the guests, organizers and participants was very positive! People enjoyed the fact that it was something different, and commented on how informal, conversational and interactive it was.

When I think about the work we're doing in our organizations across the public service, I compare it to gardeners sowing seeds and waiting to see their garden grow. When we use the tools we have, we're sure to have a bountiful harvest!

It’s not my Agenda … It’s Their Agenda – A Facilitator’s Tale
by Lloyd Legaré [1]

My story begins on an otherwise normal day in the office. Things are going along as usual when I receive a phone call: opportunity is calling.

The lady on the other end of the line tells me she attended a session I delivered a few months back. She says she really enjoyed my style and wonders if I would work with her organization at an upcoming retreat. The group is Public Safety and Emergency Preparedness Canada, one of the new formulations born in December 2003. The organization is comprised of members from three or four former departments; they would like to create a team identity for the Prairie Region. Additionally, they will soon be asked for their input into the National Crime Prevention Strategy and would like help formulating their thoughts.

As an opportunity to get more practice using some of Chartier's tools, as well as a chance to work with an entirely new group of people, the idea appeals to me. There must be a catch, and sure enough I soon find out what it is: the retreat is taking place in nine days. YIKES! Not much time for preparation or to learn about the organization. What's a boy to do?

Then it hits me: ‘Facile’! Surely my brand new copy of the booklet will have all the answers I need. I now take the time I haven't had to read through the booklet; in doing so I learn all the processes to follow in preparation for a job such as this. The problem: following each of the recommended steps would require about three more weeks than are available to me. The solution: call Bob.

A half hour conversation with my mentor (hope that doesn't come as too much of a surprise to you Mr. Chartier) and I feel much more secure. We've discussed my planned approach and I have some great tips and advice from Bob. I now feel ready for the next steps.

I call the group’s Regional Director and discuss my plans with her. She agrees with the process and tells me they are "really excited” that I've been able to find the time for this and that they know the session will be “terrific!". Now I'm more nervous than ever. How on Earth will reality live up to the expectations? No choice but to go for it and do the best I can.

So, my plan was to do the following:

Start the day talking about culture. I'll use the pieces from the Coaching Practices workshop because they fit so well with the challenge of bringing various organizational cultures together. Next I'll talk about the characteristics of groups and teams and allow participants to examine differences between the two in areas such as structure, commitment, life expectancy, objectives/goals and mutual responsibilities. After that we’ll start work developing their Team Charter. I’ll use the Interview Matrix to address four key segments of a Team Charter: Roles & Responsibilities; Internal Service Standards; Values (what we stand for) and Code of Conduct. Once finished the interviews they can

[1] *Editors Note: Lloyd Legaré was a committed Learning Organization practitioner. Sadly, he passed away in the spring of 2006. We remember him fondly.*

prioritize their input and wrap up that segment of the day.

Next step will be a Challenge Wall to identify key areas to be included in their input to the National Crime Prevention Strategy. We'll gather the brainstorming input, theme the results, prioritize the themes and do another Interview Matrix to obtain the in-depth input they are looking for.

Sounds like a pretty full day, doesn't it? That was the plan - here's the reality:

The day started very well. We had a good discussion about culture and the group enjoyed the opportunity to talk about such a relevant subject to them.

Next we discussed the comparison between groups and teams. This also went well; we had lots of great input and the group really understood the differences between the two. I wrote their input on the flip chart and said:

"I'm now going to ask you a very important question and your reply will to a large extent determine what happens for the next part of the day. You've described the characteristics of a true team and how they differ from a group. Is that how you would like to see yourselves? I know your Regional Director would like you to be a team but it doesn't work if she's the only one who feels that way. You all need to be committed to the concept for it to truly be successful. If you don't want to be a team there is little value in moving on to work on a Team Charter."

I thought they'd all jump up and down and say "Yes, of course we want to be a team", and we would then move into the next phase. Now I had my first great learning of the day: always be prepared for the unexpected.

The response was not at all what I had expected. Instead the group held a wide-ranging, in-depth discussion about teams and commitment and personal responsibility. The discussion lasted approximately an hour. I don't need to tell you the impact this had on "my" agenda. This was my second great learning: it's not my agenda, it's their agenda. As a facilitator, my role is to help them reach their goals. It's not about what I want to achieve, it's about getting them where they want to go.

Following the discussion, the group decided they'd like to move ahead with the Team Charter piece. The problem was that we only had half the time to do the work that I had planned. Through some concentration and a lot of cooperation we managed to get some quality work done on the Team Charter. It was understood that the document was far from complete and needed more work in future. I offered to re-join them at some point to complete the document if they wished.

Now it was on to the second objective for the day: gather the group's input into the National Crime Prevention Strategy. We began with the Challenge Wall; lots of ideas were raised and soon the wall was full of post-it notes. The group then moved to the wall to theme the ideas. Each member was given two check marks to identify their choices. Before long, four clear priority areas were identified. I advised the group that, rather than being forgotten, ideas not included in the top four would be given to the Regional Director for later attention.

It was interesting to note the differences in the group and how they reacted to the tools and processes that I was using. Several of them were very results-oriented and felt the time spent on the exercise took away from their opportunity have a discussion regarding *their input into the strategy. Most, however, found the process met their needs and provided them with an excellent way of putting their thoughts and ideas in a usable format for their Director.*

Following the retreat the Regional Director sent an email to the Federal Council Executive Director regarding my time spent with her group. In part her note said: "Last week, with very short notice, Lloyd Legaré joined the National Crime Prevention Centre Regional Staff Team for a day. Lloyd led us through work on the first steps in developing a Team Charter and helped us organize our thinking on issues related to the future of the National Crime Prevention Strategy. It was a very full day with a group of people who have diverse backgrounds, widely varying histories with the Federal Government and the National Crime Prevention Strategy and lots of differences of opinions about what is important!

Lloyd was great. He kept us on track, allowed discussion to flourish and helped us formulate effective questions to guide our thinking. He has a natural, relaxed facilitation style that really helps create an environment where people feel good about participating.

Lloyd, I wanted to let you know that on Friday morning, we worked in the same small groups to finish up the flip charts and then we moved around the room and each group presented their thinking on the topics. It was fantastic and the ideas really started to flow. We have agreed that we are going to get everything typed up, work some more in our small groups and then take some time during some other meetings coming up in Ottawa to keep moving forward. So, the momentum you created is carrying on!"

So, in the end, even though the process was somewhat different than any of us had anticipated, it was a positive experience for the group and me. Certainly it was a terrific learning experience for me. When I look back on the day, I think the thing that kept me on target was constantly reminding myself that "it isn't about me." It seemed that as long as I kept the fact that the day was for the group and not the facilitator I could react to situations and discussions without worrying about ownership of the process or the agenda. Other than that, my greatest learning from this event will definitely be "Don't mess with the tools!" There is a reason they are set out the way they are and that's because they work best when followed. While there might be some wiggle room in the planning stages, trying to adapt them on the fly is to invite disaster.

I hope this record of a particularly challenging and event-filled day will be of some use to other facilitators as they continue their learning. They say life is too short to just learn from your own mistakes. You have to learn from the mistakes of others as well. Perhaps some will learn from mine.