



# Facilitation Resources

1

Volume 1.  
Understanding Facilitation

IN PARTNERSHIP ...

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## Introduction to Facilitation Resources

During the 1990s there has been a renewed interest in citizen involvement in community decisions. While many issues are still decided by powerful and financially strong networks, the ability of the average citizen to collect relevant information, address issues with intelligence, and initiate public meetings has made the public influence greater.

Those who work with organizations have learned the need for effective facilitation skills. In the Foreword to *Facilitator's Guide to Participatory Decision Making* by Sam Kaner, Michael Doyle presents two important lessons learned. "Lesson one: if people don't participate in and 'own' the solution to the problems or agree to the decision, implementation will be half-hearted at best, probably misunderstood, and, more likely than not, fail. The second lesson is that the key differentiating factor in the success of an organization is not just the products and services, not just its technology or market share, but the organization's ability to elicit, harness, and focus the vast intellectual capital and goodwill in their members, employees, and stakeholders. When these get energized and focused, the organization becomes a powerful force for positive change in today's business and societal environments."

*Facilitation Resources*, available as a set of eight volumes, is an effort to enhance volunteers' group facilitation techniques. The participants will be able to use the skills in facilitating nonprofit groups and organizations through important discussions vital to the organization and to the community.

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Page 1.16 ..... Evaluating Yourself as a Facilitator  
Pages 1.19-21 ..... Coaching Reflection Tools  
Page 1.22 ..... GAPS Model Worksheet  
Page 1.27 ..... Attitude Assessment  
Page 1.28 ..... Eight-Stage Change Process  
Page 1.35 ..... *Facilitation Resources* order form

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1



## Contents

### Volume 1. Understanding Facilitation

Overview: Understanding Facilitation .....	1.7
Stages and Tasks of Facilitation.....	1.9
Clarifying Your Role.....	1.10
Sample Facilitator Position Description .....	1.12
Ten Principles of Effective Facilitation.....	1.13
Facilitation Observation Tool .....	1.14
Evaluating Yourself as a Facilitator.....	1.16
Coaching .....	1.17
Reflection Tool: Improving Your Coaching .....	1.19
Reflection Tool: Planning Coaching Strategies.....	1.20
Reflection Tool: Reaching Your Coaching Goals .....	1.21
GAPS Model: A Tool for Coaching .....	1.22
Leading Change.....	1.23
Leading Change: Attitude Assessment .....	1.27
Leading Change: The Eight-Stage Change Process .....	1.28
Finding More Resources.....	1.32

### Volume 2. Contracting and Handling Logistics

Overview: Agreeing to Facilitate and Handling Logistics.....	2.7
Contracting: Diagnosing the Situation .....	2.9
Contracting: Ethical and Process Questions .....	2.9
Worksheet: Some Initial Questions—Diagnosing the Situation	
During Contracting .....	2.10
Worksheet: Some Initial Questions—Ethical and Process	
Considerations in Contracting.....	2.11
Worksheet: Logistics and Arrangement .....	2.12
Advance Planning for Inclusive Facilitation.....	2.14
Meeting Organizer.....	2.16
Equipment and Materials Checklist .....	2.18
Room Arrangement.....	2.19
Finding More Resources.....	2.20

### Volume 3. Getting Focused: Vision/Mission/Goals

Overview: Getting Focused—Vision/Mission/Goals .....	3.7
Facilitating the Development of a Shared Vision.....	3.9
Planning an Agenda .....	3.11
Meeting Agenda Worksheet .....	3.14
Meeting Summary.....	3.15
Creating Effective Mission and Vision Statements .....	3.16
Worksheet: Brainstorming a Mission Statement.....	3.17
Example Worksheets and Planning Session Agenda.....	3.18
Exercise: Letter to a Significant Child .....	3.22
Strategic Planning Worksheets 1 and 2: 2020 Foresight.....	3.23
Finding More Resources.....	3.25

### Volume 4. Managing Group Interaction

Overview: Managing Group Interaction.....	4.7
Icebreakers and Openers .....	4.9
Ground Rules for Facilitators .....	4.14
Identifying and Agreeing on Norms.....	4.15
Snow Cards Exercise .....	4.16
Facilitator Training Norms (Sample).....	4.17
Ground Rules Worksheet.....	4.18



Helping a Group Stay on Track .....	4.19
Levels of Intervention.....	4.20
Stages of Group Development .....	4.21
Behaviors That Enhance or Hinder Group Effectiveness.....	4.25
Worksheet: Forms of Nonverbal Communication .....	4.27
Working with Large Groups .....	4.28
Large Group Methods.....	4.29
Finding More Resources.....	4.35

## Volume 5. Making Group Decisions

Overview: Making Group Decisions .....	5.7
Decision-Making Models.....	5.8
Consensus Building .....	5.10
Fist to Five: Determining Support.....	5.12
Guidelines for Using Consensus .....	5.13
Decision-Making Strategies .....	5.17
Affinity Mapping.....	5.18
Brainstorming .....	5.19
Criterion Listing .....	5.22
Data Dump .....	5.23
Envision Worst/Best That Can Happen .....	5.24
Nominal Group Process.....	5.25
Worksheet: Decision-Making Case Study.....	5.27
Worksheet: Making Group Decisions.....	5.28
Finding More Resources.....	5.29

## Volume 6. Dealing with Group Conflict

Overview: Dealing with Group Conflict .....	6.7
Facilitating Conflict-Habituated Situations.....	6.9
Guidelines for Dialogue: Listening.....	6.10
Guidelines for Dialogue: Leveling.....	6.11
The Iceberg Theory of Group Relations.....	6.12
Conflict Framework .....	6.13
Worksheet: Reflection—Group Conflict .....	6.15
Handling Common Problems.....	6.16
Problem Meeting Behaviors.....	6.19
Worksheet: Handling Common Problems.....	6.24
Dealing with Challenging Behaviors Role Play .....	6.25
Case Example: The County Feedlot Committee .....	6.26
Worksheet: Sample Role Play.....	6.27
Finding More Resources.....	6.28

## Volume 7. Utilizing Diversity, Power, and Ethics

Overview: Diversity, Power, and Ethics.....	7.7
U.S. Attitudes and Beliefs .....	7.9
Survey: Individual Attitudes & Beliefs .....	7.13
Facilitation and Diversity .....	7.17
Power Bases.....	7.18
Power Bases: Worksheet for Reflection .....	7.20
Code of Ethics for Facilitators .....	7.21
Ethics and Facilitation .....	7.23
Worksheet: Ethics and Facilitation.....	7.24
Finding More Resources.....	7.25

## Volume 8. Designing a Volunteer Facilitation Program

Executive Summary: Extension Facilitation Program.....	8.7
Overview of Designing a Program.....	8.9



Examples of Specific Schedules .....	8.12
Case Examples	
The County Historical Society Retreat .....	8.14
The County Feedlot Committee.....	8.15
The Church Camp .....	8.16
The Gift.....	8.17
A Sexual Orientation/4H Leader Controversy .....	8.18
Family Service Collaborative.....	8.19
Marketing Volunteer Facilitators to the Community.....	8.20
Sample News Release.....	8.21
Sample Application.....	8.22
Sample Detailed News Release.....	8.24
Sample Brochure .....	8.27
Pre/Post Participant Assessment.....	8.29
Pre-assessment Worksheet .....	8.30
Post-assessment Worksheet .....	8.32
Individual Session Evaluation.....	8.34
Sample Activity Report for Facilitators.....	8.35
Volunteer Facilitation Program—Evaluation Summary.....	8.36
Design Team Roster.....	8.37
Finding More Resources.....	8.38

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# Overview: Understanding Facilitation

During the 1990s there has been a renewed interest in citizen involvement in community decisions. While many issues are still decided by powerful and financially strong networks, the ability of the average citizen to collect relevant information, address issues with intelligence, and initiate public meetings has made the public influence greater.

Those who work with organizations have learned over the years the need for effective facilitation skills. In the Foreword to *Facilitator's Guide to Participatory Decision Making* by Sam Kaner, Michael Doyle presents two important lessons learned. "Lesson one: if people don't participate in and 'own' the solution to the problems or agree to the decision, implementation will be half-hearted at best, probably misunderstood, and, more likely than not, fail. The second lesson is that the key differentiating factor in the success of an organization is not just the products and services, not just its technology or market share, but the organization's ability to elicit, harness, and focus the vast intellectual capital and goodwill in their members, employees, and stakeholders. When these get energized and focused, the organization becomes a powerful force for positive change in today's business and societal environments."

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## Facilitation Roles

The dictionary defines facilitate as "to free from difficulties or obstacles; make easier, aid, assist." That is the role of the facilitator—to design and manage a process that helps a group accomplish its work while minimizing problems within the group.

There are several stages of facilitation and tasks that must be accomplished during each stage. These include pre-work, opening the meeting or event, facilitating the meeting, closing the meeting, and following up with planners.

Facilitating a meeting is different from leading a monthly organizational meeting using parliamentary procedure. Clarifying your role is very important. The facilitator is a neutral guide who takes an active role in guiding the process while adhering to principles of effective facilitation. Such a neutral person is usually someone from outside the group and may show no vested interest in the outcome. A good facilitator guides the process.

## Principles of Effective Facilitation

The facilitator and group members share responsibility for progressing toward the goals of the group. The facilitator serves as a guide to the group. Key principles of quality facilitation include believing that groups can make good decisions, ensuring participation, convening people as a neutral guide, sharing a

1





sense of group goals, using effective processes, utilizing diversity and wisdom, improving continuously, working together with trust, progressing toward goals, and learning from experiences.

One excellent way to improve skills as a facilitator is to observe another facilitator in action. An observation worksheet that lists the key facilitation elements for rating is included in this section.

Evaluating yourself as a facilitator is important to continuous improvement of the group and the facilitator. Several questions are included that may be used verbally or prepared as a worksheet for group input.

## Coaching

Facilitators often coach others to enhance their participation in the work that needs to be done. A coach works one-on-one with individuals and with the group to draw on individual strengths and develop the competencies they will need to be effective in the future. Coaches provide both support and challenge. More about coaching, and worksheets for reflection, are included in this section. The GAPS model (a tool for coaching) is included as a worksheet. It helps a facilitator become aware of the person's goals, the person's abilities, how others see the person, and what others expect of the person.

## Leading Change

A common role of facilitators is that of "change agent." Understanding the nature of leading change can help a facilitator become more helpful to groups. This is especially important if you are invited to work with a change initiative during tense times. Worksheets are included in this section to assess your group's present attitudes and facilitate a change using an eight-step process.



## Stages and Tasks of Facilitation

This is a framework that describes the typical stages of facilitation and tasks of the facilitator.

### **A. Pre-work**

1. Contracting or agreeing to facilitate
2. Planning the agenda
3. Confirming who is attending
4. Arranging the meeting room and supplies

### **B. Opening the meeting or event**

1. Making introductions
2. Exploring the purpose of the meeting or event
3. Helping the group determine the agenda
4. Breaking the ice
5. Setting ground rules
6. Initiating discussion

### **C. Facilitating the meeting**

1. Proceeding through the agenda
2. Helping the group stay on track
3. Ensuring participation
4. Building consensus and making decisions
5. Managing conflict
6. Handling disruptive behaviors
7. Fulfilling your role as facilitator ethically

### **D. Closing the meeting**

1. Reviewing the agenda
2. Identifying the next agenda
3. Reviewing decisions/actions
4. Answering questions
5. Evaluating the meeting

### **E. Following up with planners**

1. Clarifying remaining expectations for facilitator
2. Asking for helpful feedback
3. Determining action for any unfinished business
4. Saying “thank you” and “goodbye”



# Clarifying Your Role

It is very important to clarify your role with the group. At times a group may request that one person serve a number of different roles within the group. This can become very confusing not only for the person who is being asked to serve multiple roles but for all of the members of the group. Role confusion is very likely to occur. It is also important to consider the concept of neutrality as it applies to facilitation. Facilitators operate best when they are neutral parties and have no stake in the outcome of the process or decision. It is not wise to take on multiple roles with the same group (especially during a single session or meeting event).

## Will you be leading, managing, educating, or facilitating?

Each of these roles has a different impact on the process used to make decisions and on the outcome of the decision. Make sure you and the group are clear about which role you are serving in. Do not try to serve multiple roles.

When working with a group, you may be asked to serve in one or several of the following roles:

### **Leader: Directing the decision making**

Team leaders may be asked to facilitate as a leadership role within the group. This is a difficult role: it's hard to manage process, interaction and logistics quality from a neutral perspective because of your vested interest in the outcome of the group.

### **Manager: Providing logistical support**

Managing all of the aspects to ensure the positive outcomes of a group meeting is an important role. It is difficult, particularly in large groups, to attend to logistical concerns such as lunch arrangements, emergencies, and other matters while also facilitating the group process.

### **Educator: Providing information**

Educators are those who bring expert knowledge to improve decisions made by a group. It is difficult for an educator to also manage the group process and not be biased by the information they have provided to the group.

### **Facilitator: Guiding the group process**

Facilitating a group process without making content contributions is an important role. It is simplest to avoid leading, educating, and directly managing while facilitating.



## Neutrality

There are those who say that facilitators are always neutral. Actually no one is unbiased; however, a facilitator needs to be able to convey no preference for any solutions the group considers. The facilitator is not neutral about the content of a group's discussion when it involves how to manage group or inter-personal processes more effectively. When there is discussion about the process, the facilitator becomes involved in the discussion.

There are those also who argue that an internal facilitator can never be neutral. Two criteria can be used to judge neutrality:

- a) The facilitator must believe that his or her personal views about the substance of the facilitation will not affect the facilitation.
- b) The client group must believe that the facilitator's personal views about the substance of the facilitation will not significantly affect the facilitation.

At times a facilitator will be asked for an opinion about the issue before the group. It is important not only to respond to the question, but also to clarify how this position would affect the client. This is a way to determine whether the client's concern is one of neutrality or another concern. There are times that the facilitator's position needs to be shared with the entire client group. If there are strong concerns, another facilitator may need to be selected. A facilitator may be acceptable to the individual making the arrangements, but the entire group may have a very different reaction.



### Sample

# Facilitator Position Description

The role of the facilitator includes focusing on four areas: Structure, Relationships, Focus, and Key Resources.

### **Structure:**

Meet with representatives of the group to determine the needs of the group, expectations, and a plan for the process.

Develop an effective process that will keep the focus on the group task to accomplish the goals in a timely manner. There are many different structures or processes from which to choose.

Establish an environment at the meeting that will provide order to the process and create an environment that is open and honest.

### **Relationships:**

Create an atmosphere of openness and fairness that encourages all participants to be involved in the process. Assure all participants are heard, and decisions are the responsibility of the participants.

Involve appropriate stakeholder groups in the process.

Provide clarity around the process and decisions. Make sure all participants understand what the group decided and future steps.

Address conflict and behavior problems within the group.

### **Focus:**

Ensure that all participants understand the goals for the group. Work to maintain the group focus on achieving the agreed-upon goals.

Ensure that participants are clear about the process and the decisions that have been made.

### **Key Resources:**

The facilitator does not provide the answers. They come from the group and/or from credible sources.

Assure that the group decision represents diverse perspectives as appropriate for the group.

Be aware when more data and information is needed. Seek ways to provide it to the group in a balanced way so appropriate decisions can be made.

People in groups contribute in different ways and in different amounts. Capitalize on what people have to contribute, but be sure all have some involvement in the process.

Maintain a sense of humor.

# Ten Principles of Effective Facilitation

Facilitation is increasing the “ease of performance” of any action as opposed to inhibiting action (Webster’s 20th Century Dictionary). A group and facilitator(s) have mutual opportunity and responsibility for performance. The facilitator(s) has the neutral leadership role of guiding the process “to make it easy or less difficult.” Group members contribute the hopes, ideas, and data for action. The following principles focus on the effective performance of facilitation, assuming active engagement of both facilitator(s) and group members.

Facilitation is

- 1 . Believing that people coming together can lead to thoughtful, fair decisions and action.
2. Communicating and participating by those with a stake or an interest in the issue/concern.
- 3 . Creating a public space and convening people with a facilitator who serves as a neutral guide and coach of the process.
4. Building and sharing an understanding of what the group desires for goals and action.
5. Using effective methods and processes to guide/facilitate group work.
6. Honoring, recognizing, and utilizing diverse views, experiences, and insights for the greater good of the group.
7. Improving facilitation processes through thorough planning, invited feedback, and group reflection.
8. Working together in an atmosphere that assumes mutual respect, trust, and self-confidence.
9. Progressing toward the agreed-upon or renegotiated goals of the group.
10. Learning from experiences by participants and facilitators to build upon their capacities as productive, contributing citizens.



## Facilitation Observation Tool



This form is to be used as an observation tool in observing someone else as a facilitator. Take it along when you attend a meeting and have the opportunity to watch the process of another facilitator. Use this tool as you observe the facilitator and rank the following facilitation elements poor, good, or excellent. There is room to make comments. Use this space to make notes to yourself on what the facilitator did well or what could have been done to be more effective.

<b>Facilitation Elements</b>	<b>Poor</b>	<b>Good</b>	<b>Excellent</b>
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**1. Participation:**

Those with a stake or an interest in the issue are participating.

Comments:

**2. Facilitator Role:**

Facilitator is a neutral guide and coaches the process of convening people.

Comments:

**3. Shared Vision:**

The group has clear goals and vision for action.

Comments:

**4. Effective Processes:**

Effective methods and processes are used to guide/facilitate the group work.

Comments:



# 1. Understanding Facilitation

<b>Facilitation Elements</b>	<b>Poor</b>	<b>Good</b>	<b>Excellent</b>
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**5. Diversity Utilized:**

Diverse views are honored, recognized, and utilized, bringing experiences and insights for the greater good of the group.

Comments:

**6. Planning and Feedback:**

Thorough planning, feedback, and group reflection are used to improve facilitation.

Comments:

**7. Supportive Atmosphere:**

The atmosphere assumes mutual respect, trust, and self-confidence.

Comments:

**8. Group Progress:**

The group progresses toward the agreed-upon or renegotiated goals.

Comments:

**9. Learn from Experiences:**

Participants and facilitator learn from their experiences to build upon their capacities as productive, contributing citizens.

Comments:

Worksheet: Make copies for use at future meetings.





# Evaluating Yourself as a Facilitator

Evaluations are important to both you as the facilitator and your primary planning committee. Listed below are examples of questions you can adapt to most sessions. They can be used either as a yes-no rating system or as open-ended questions to elicit comments. Group participants aren't usually interested in the process so much as the outcomes. However, evaluations can improve group processes, a goal in which most participants are very interested.

1. Was our goal clear?
2. Were we kept "on task" working toward it?
3. Was our communication open and honest?
4. Did everyone participate and have a voice in decision making?
5. Were there verbal or nonverbal distractions?
6. Was there not enough time, or could we have finished our task sooner?
7. Did we have enough information and background data to make good decisions?
8. Should others have been included who weren't here?
9. Was the facilitator effective and objective?
10. Did the end of meeting summary accurately describe what we accomplished?
11. Were there any hidden agendas? If so, did they remain "hidden"?
12. As you reflect on the results of this session, would you say it was worth your time?

Laura Spencer, in *Winning Through Participation*, describes evaluation in terms of whether the group is progressing in its "journey towards consensus" or its "journey towards action." Is your team?



## Coaching

Facilitators often coach others to enhance their participation in the work to be done. What is a coach? A coach works one-on-one with individuals and with the group to draw on individual strengths and to develop the competencies they will need to be effective in the future.

Today we can find any number of motivational speakers that charge large fees to share their insights on coaching. For example:

- Mike Ditka, National Football League coach: "If you've got a bad attitude, you've got no chance." (\$20,000)
- Lou Holtz, college football coach: "There are three simple rules: Do what's right. Don't be bitter or negative. Set high standards." (\$25,000)
- Pat Riley, National Basketball Association coach: "A winning formula includes teamwork, attitude, and overcoming adversity." (\$45,000)

According to a 1996 poll conducted by Personnel Decisions, Inc., 90 percent of American workers who have had on-the-job coaching believe that it was an effective development tool. Workers reported their performance improved when someone took a personal interest in helping them do their jobs better. Unfortunately, only 38 percent of the workforce has ever had a coach or mentor.

Facilitators who see themselves as coaches see their group members as individuals of innate talent and worth. Coaching is working with others at the edge of their comfort zone. The effective coach provides both support and challenge.

- Support is:
  - Essential for change.
  - A foundation for taking risks and trying new things.
- Challenge means:
  - Willing to push.
  - Telling the hard truth.
  - Confronting.
  - Rejecting easy answers.

What coaches do:

- Instill fundamentals.
  - Master needed skills.
  - Stay focused on the task.
- Build teamwork.
  - Individual roles interlock with others in the group.
  - Keep group working together in harmony.
- Evaluate and adjust.
  - Reposition group members.
  - Change the strategy.
  - React to immediate needs.
- Anticipate future circumstances.
- Reinforce and motivate.
  - Correct problems without destroying self-confidence.
  - Praise good efforts.
  - Act as a model and set the tone for others.



Facilitator skills that are helpful in coaching include:

- Building trust.
  - Being trustworthy.
- Setting expectations.
- Listening.
- Verbal communication.
  - Provide feedback.
  - Give recognition.
  - Question.
  - Inform and instruct.
- Mentoring.
- Observing and measuring performance.
  - Gather data.
  - Give praise.
  - Point out areas for improvement.
- Setting a positive example.

Sometimes it can be difficult to give others feedback though coaching. Possible barriers are

- Reluctance to confront.
- Fear of offending.
- Fear of failure.
- No time.
- No incentive or accountability.
- Lack of skills or confidence.

An effective coach

- Takes time to listen.
- Sees everyone as a unique person.
- Cares about each person and helps with individual problems.
- Sets a good example.
- Lets people know they can do more than they thought they could.
- Rolls up the sleeves and pitches in.
- Is open and lets people know his or her perspectives.
- Praises people for good work and is straightforward when they mess up.

Effective coaches work to develop their own tool kits. Their tools include

- An approach they are comfortable with, that is consistent with their own style.
- Techniques that work for them.
- Continuous learning.





# Reflection Tool: Planning Coaching Strategies

The following questions may be helpful to plan your coaching strategies with both individuals and teams.

1. What level of trust do you have with the person or group?
2. What is your personal commitment to the person's or group's development?
3. What are the person's or group's goals?
4. What seems to motivate this person or group?
5. What does this person or group do well?
6. In light of the current goals, how does this person or group need to improve?
7. What is this person's or group's current level of confidence?
8. What aspects of the work to be accomplished are best for you to coach?

Source: John Zuber, Lecturer, University of Minnesota, 1997.



# Reflection Tool: Reaching Your Coaching Goals

The following questions may help you plan how to reach your coaching goals.

### **Building relationships**

Do you understand and have ideas to develop your relationships with the people involved?

### **Cultivating awareness**

How do you know what is going on?

How do you observe and collect behavioral information?

How do you provide feedback?

How do you listen?

### **Inspiring motivation**

How do you motivate the person or team to learn and develop?

### **Seeking goal agreement**

How can personal buy-in to goals and roles be developed?

Has the organizational buy-in to goals and roles been developed?

How do you monitor congruence between individual goals and organizational priorities?

### **Determining coach involvement**

Is your focus on development (not control) of the person or team?

Have you considered (1) the importance of the task and (2) the readiness of the person or group?

Source: John Zuber, Lecturer, University of Minnesota, 1997.



# GAPS Model: A Tool for Coaching

When coaching, it is important to be aware of the person's goals, the person's abilities, how others see the person, and what others expect of the person.

## **G**oals

What are the goals of the person or team?

## **A**bilities

What abilities does the person or team have?

What abilities are missing or need to be strengthened?

## **P**erceptions

What do you see the person or team do?

What are your perceptions of the person or team?

What are others' perceptions of the person or team?

## **S**tandards

What do others expect of the person or team?

How is the person or team measuring up to these standards?

Source: John Zuber, Lecturer, University of Minnesota, 1997.



# Leading Change

What comes to your mind when you think of change? Orderliness? Mess? Russell L. Ackoff at the University of Pennsylvania defines a mess this way: "In a real sense, problems do not exist. They are abstractions from real situations. The real situations from which they are abstracted are messes. A mess is a system of interrelated problems. We should be concerned with messes and not problems. Science has provided powerful methods, techniques and tools for solving problems, but it's provided little that can help in solving messes. The lack of mess-solving capability is the most important challenge facing us."

Leaders and managers are often asked to help a group working on some kind of change. It is important to review what we are coming to understand about the nature of change itself.

How we think about change is a matter of perspective. For example, do you think of a loss of control that is disruptive, destructive, alters stability, continuity, tradition? Or do you think of innovations that increase productivity and lead to development and improvement?

For most, change is easy to initiate and difficult to guide so that it accomplishes what you set out to do. Peter Senge at MIT's Sloan School of Management has found that most people don't resist change, they resist being changed. For many of us, our dilemma is that we hate change and love it at the same time. What we really want is for things to remain the same, but get better.

A Gallup Poll of 400 executives found:

- 56 percent of Fortune 1,000 companies have no structure in place to handle change.
- 75 percent of the respondents agree that executives have a vested interest in the status quo; they do not like to lose control; they do not know what to do about change; and they are too short-term oriented.

The key issues respondents identified for change were cost pressures, information technology, and rising consumer demands.

Warren Benis, professor, University of Southern California, and author of *The Executive Briefing Series*, *The Absolutes of Leadership*, claims that 95 percent of companies don't change until they are threatened with dying. It can be important to keep in mind that as a facilitator you are often invited to work with a change initiative during tense times.

Plato reminds us, "Change takes place no matter what deters it. There must be measured, laborious preparation for change to avoid chaos." Facilitators share some of the responsibility to help prepare for change. Author and consultant Marilyn Ferguson suggests, "It's not so much that we're afraid of change, or so in love with the old ways; but it's like being in between trapezes. It's Linus when his blanket is in the dryer. There's nothing to hold on to."

Michael Beer, consultant and professor at Harvard Business School, cautions in *Readings in Human Resource Management*, "Many change programs are so gen-





eral and standardized that they don't speak to the day-to-day realities of particular units. Buzzwords like 'quality,' 'participation,' 'excellence,' 'empowerment,' and 'leadership' become a substitute for a detailed understanding of the business." This is a challenge to facilitators helping groups to bring about change. Understanding the substance of the particular issues is important.

Facilitation can be key as groups take responsibility for identifying a needed or desired change.

The Heartland Center in Nebraska offers these ingredients and suggestions for change based on their research in rural midwestern communities.

- Positive attitudes
- Entrepreneurial spirit
- Bias for action
- Focus on controllables
- Plan for development
- Strategic outlook
- Vision for the future

Often, the need for change is recognized, and specific ways must be found to successfully facilitate it. Some facilitators work to empower members of the group, and suggest a strategic approach that includes these elements.

- Enhance people's ability to initiate and manage change.
- Change the agreed-upon focus from developing or delivering a program to enhancing performance.
- Give people the tools to increase their effectiveness.

As a change facilitator helps a group examine the issue it hopes to address and they agree that it is something they can control or have an impact on, it can be helpful to review the lessons of experience of the people in the group. A facilitator might ask:

- What is your experience or history with change?
- What do you think about change?

Remember that people's attitudes determine, in part, what they do.

John Kotter, Harvard Business School professor and consultant, suggests the following framework for leading change.

1. Establish a sense of urgency.
  - Examine the broader context and competitive realities.
  - Identify and discuss crises, potential crises, and opportunities.
2. Create a guiding coalition.
  - Create a group with enough influence to guide the change.
  - Get the group to work effectively together.
3. Develop a vision and strategy.
  - Create a shared vision to help direct the change effort.
  - Develop strategies for achieving that vision.



4. Communicate the change vision.
  - Use every vehicle possible to constantly communicate the new vision and strategies.
  - Have the guiding coalition model the behavior expected of others.
  - Keep these elements in mind to communicate the vision effectively:
    - Simplicity: Don't use jargon.
    - Metaphor, analogy, and example: Use pictures!
    - Multiple forums: Spread the word in many ways.
    - Repetition: Say it again and again.
    - Set the example: If we act in ways that are inconsistent with the vision, all is lost.
    - Explain seeming inconsistencies.
    - Give-and-take: Two-way communication is always more effective than one-way.
5. Empower broad-based action.
  - Get rid of obstacles.
  - Change those things that undermine the change vision.
  - Encourage risk-taking and nontraditional ideas, activities, and actions.
6. Generate short-term wins.
  - Plan for visible improvements (wins).
  - Create those wins.
  - Visibly recognize and reward people who made the wins possible.
  - Facilitators can be key in reminding a group of the need to set goals and empirically test the effect of change.
7. Consolidate gains and produce more change.
  - Use increased credibility to change all systems, structures, and policies that don't fit the vision.
  - Develop and reward people who can implement the vision.
  - Reinvalidate the process with new projects and people.
8. Anchor new approaches in the culture.
  - Create better performance through customer- and productivity-oriented behavior, more and better leadership, and more effective management.
  - Articulate the connections between new behaviors and successes.
  - Develop ways to ensure continued leadership and succession.

A facilitator needs to develop a comfort level with a group's dissatisfaction. Dissatisfaction is often a key motivator since discontented systems are more innovative than contented ones. Successful organizations are more likely to maintain the status quo, making unhappy and disgruntled views a resource.

A facilitator working with a group to take charge of change, James Kouzes, president of TPG/Learning Systems, and Barry Posner, professor of organizational behavior at Santa Clara University, recommend the following steps.

1. Have a process for collecting innovative ideas.
2. Put idea gathering on your own agenda.
3. Set up little experiments.
4. Renew teams.
5. Honor risk-takers.



6. Analyze every failure, as well as every success.
7. Model risk-taking.
8. Foster hardiness.

The worksheets in this section can be used to assess your group's present attitudes and facilitate a change using John Kotter's eight-step process.

Sources:

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# Leading Change: Attitude Assessment

Harlan Cleveland, political scientist, public executive, and president of the World Academy of Art and Science, has written hundreds of articles and eleven books, mostly on executive leadership and effective change. He suggests that the puzzles people will have to solve will be unique to the people, their histories, and what they are trying to accomplish. Often we teach leadership skills to enhance our abilities to accomplish change initiatives. Cleveland suggests, "The steepest part of the learning curve is not skills but attitudes."

Circle the person's or group's attitude at present; circle "priority to improve" for the future for those attitudes that need adjustment.

	PRESENT			FUTURE
1. Intellectual curiosity	good	average	poor	priority to improve
2. Interest in what other people think and why they think that way	good	average	poor	priority to improve
3. A hunch that most risks are there to be taken	good	average	poor	priority to improve
4. A mindset that crises are normal, tensions can be promising, and complexity is fun	good	average	poor	priority to improve
5. Realization that paranoia and self-pity are for people (groups, organizations) who don't want to lead	good	average	poor	priority to improve
6. Personal responsibility for the general outcome of your efforts	good	average	poor	priority to improve
7. Unwarranted optimism—the conviction that there must be some more upbeat outcome than would result from adding up all the available expert advice	good	average	poor	priority to improve

Source: Adapted from Harlan Cleveland, Leadership Readings, American Leadership Forum, Stanford, CA, 1995.



# Leading Change: The Eight-Stage Change Process

Where is your organization in the change process? Indicate the percent of completion of each stage by placing an X on the continuum nearest the number that most accurately reflects your judgment. The number 1 suggests that very little has been done; the number 5 indicates that work on that stage has been successfully completed.

1. Establish a sense of urgency.

- Examine the market and competitive realities.
- Identify and discuss crises, potential crises, or major opportunities.

1	2	3	4	5
Haven't begun		More than half-way there		Successfully completed

Interventions needed:

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2. Create a guiding coalition.

- Put together a group with enough power to lead a change.
- Get the group to work together like a team.

1	2	3	4	5
Haven't begun		More than half-way there		Successfully completed

Interventions needed:

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# 1. Understanding Facilitation

3. Develop a vision and strategy.
- Create a vision to help direct the change effort.
  - Develop strategies for achieving that vision.

1	2	3	4	5
Haven't begun		More than half-way there		Successfully completed

Interventions needed:

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4. Communicate the change vision.
- Use every vehicle possible to constantly communicate the new vision and strategies.
  - Have the guiding coalition role model the behavior expected of individuals.

1	2	3	4	5
Haven't begun		More than half-way there		Successfully completed

Interventions needed:

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Worksheet: Make copies for use at future meetings.



# 1. Understanding Facilitation

## 5. Empower broad-based action.

- Get rid of obstacles.
- Change systems or structures that undermine the change vision.
- Encourage risk-taking and nontraditional ideas, activities, and actions.

1	2	3	4	5
Haven't begun		More than half-way there		Successfully completed

Interventions needed:

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## 6. Generate short-term wins.

- Plan for visible improvements in performance, or "wins."
- Create those wins.
- Visibly recognize and reward people who made the wins possible.

1	2	3	4	5
Haven't begun		More than half-way there		Successfully completed

Interventions needed:

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# 1. Understanding Facilitation

7. Consolidate gains and produce more change.
- Use increased credibility to change all systems, structures, and policies that don't fit together and don't fit the transformation vision.
  - Hire, develop, and promote people who can implement the change vision.
  - Reinvigorate the process with new projects, themes, and change agents.

1	2	3	4	5
Haven't begun		More than half-way there		Successfully completed

Interventions needed:

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8. Anchor new approaches in the culture.
- Create better performance through customer and productivity oriented behavior, more and better leadership, and more effective management.
  - Articulate the connections between new behaviors and organizational success.
  - Develop means to ensure leadership development and succession.

1	2	3	4	5
Haven't begun		More than half-way there		Successfully completed

Interventions needed:

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## Finding More Resources

The educational and corporate community has dozens of marvelous resources available for the motivated facilitator wishing to find more resources. Also, the practical wisdom of gifted community facilitators should be tapped. This guidebook has drawn upon several excellent resources and those are listed in the following reference list.

In the search for more resources consider human resources, written resources, technology-enhanced resources, organizational resources, and other resources. Identify excellent facilitators and interview them. Practical wisdom is often not written but accessible through stories. Utilize libraries to search for materials. Search for organizations that support facilitator growth and learning, like the National Facilitators Network (has state-based groups, too). Contact your local Cooperative Extension Service for information and coaching.

Consider searching for resources under the general heading of facilitation as well as under each of the sub-topics important to facilitation (conflict, decision-making processes, etc.). Remember that the context in which facilitation is done is important—in board rooms, in community meeting rooms, in group retreat settings, etc. Evaluate the resource to see if it is more appropriate in one context than another.

Best wishes finding more resources to build upon your skills, understanding, and expertise as a facilitator.

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