



Facilitating the VM Job Plan

*A BRIEF REVIEW OF TOOLS & TECHNIQUES
TO HELP YOU MANAGE TEAMS*

Presentation Objectives

- ▶ Discuss basic facilitation skills
- ▶ Relate facilitator core competencies to VM Job Plan
- ▶ Understand the importance of neutrality as a facilitator
- ▶ Distinguish the difference between a consultant and a facilitator

What is Facilitation?

- ▶ To facilitate means "to make easy" (derived from the Latin adjective *facilis*)
- ▶ Synonyms:
 - Easing
 - Simplification
 - Enablement

What is Facilitation?

*Group facilitation is a process in which a person whose selection is acceptable to all the members of the group, who is **substantively neutral**, and who has **no substantive decision-making authority**, diagnoses and intervenes to **help a group improve how it identifies and solves problems** and makes decisions, to **increase the group's effectiveness**.*

- Roger Schwarz, The Skilled Facilitator

What is a Facilitator?

- ▶ A leader who plays a ***different role*** than that of the group members
- ▶ One who assists and guides, and ***does not control***
- ▶ A process guide; does not evaluate or contribute substantive ideas; ***works to ensure that the group accomplishes its goals***

Who Are Facilitators?

- ▶ Project Managers
- ▶ Construction Managers
- ▶ Shop Foremen
- ▶ Teachers
- ▶ Parents
- ▶ Police Chief
- ▶ Fire Chief
- ▶ First Responders
- ▶ Religious Leaders
- ▶ Military Officers
- ▶ ***Value Study Team Leaders***

Types of Facilitated Sessions

- ▶ Problem solving
- ▶ Consensus building
- ▶ Strategic planning
- ▶ Developmental facilitation
- ▶ Modeling and design workshops
- ▶ Organizational change
- ▶ Conflict resolution
- ▶ Partnering
- ▶ Training sessions
- ▶ VE/VA studies

Types of Facilitators

- ▶ So, what you really mean is...
- ▶ We're going to show 'em what's right!
- ▶ Here's a report template; fill it out and I'll be back in 3 days...
- ▶ What needs to happen is...

Are you a Facilitator
or a Consultant?

What is a CVS?

- ▶ Value Specialists and Value Program Managers who have ***demonstrated expert level experience and knowledge in the practice of the value methodology***
- ▶ Team leader will plan, lead, and ***facilitate*** the Value Study
- ▶ Expected to have numerous ***skills and experience that are enable coaching*** and/or teaching the value study methods

CVS Expertise

- ▶ Value Methodology
- ▶ Transform Information
- ▶ **Team Facilitation**
- ▶ Function Analysis
- ▶ Cost Analysis
- ▶ Pre-Workshop Stage
- ▶ Workshop Stage
- ▶ Post-Workshop Stage
(Document Results)
- ▶ Value Program Mgmt.

Facilitator Certification

Requires practical proficiency in six competencies:

1. Create collaborative client relationships
2. Plan appropriate group processes
3. Create and sustain a participatory environment
4. Guide group to appropriate and useful outcomes
5. Build and maintain professional knowledge
6. Model positive professional attitude

How Do Competencies Relate?

IAF Competencies

- ▶ Create collaborative client relationships
- ▶ Plan appropriate group processes
- ▶ Create and sustain a participatory environment
- ▶ Guide group to appropriate and useful outcomes

CVS Expertise

Pre-Study Activities

VM Job Plan

How Do Competencies Relate?

IAF Competencies

- ▶ Build and maintain professional knowledge
- ▶ Model positive professional attitude

CVS Expertise

Continuing Education

Neutrality

- ▶ Enables the group to think creatively about issues where there are differences of agenda and opinion
- ▶ Avoids perception of predetermined outcome
- ▶ Supports group decision making without exerting influence on the outcome

Neutrality

It's a question of process versus content.

Content is the “stuff” being worked on.

Process is the way in which the conversation occurs.

Content = What

Process = How

Facilitator vs. Consultant

From Merriam Webster

Facilitator: one that helps to bring about an outcome by providing indirect or unobtrusive assistance, guidance, or supervision

Consultant: one who gives professional advice or services; expert

Facilitator vs. Consultant

The CVS is the facilitator.

The VE team members are the consultants, the subject matter experts, the ones who bring specialization to the table.

Things to Consider...

PREPARE, PREPARE, PREPARE

- ▶ Meeting objectives and goals
- ▶ High-level agenda, reviewed with and approved by client
- ▶ Facilitator's agenda (details, timing)
- ▶ Learn the customer's terminology

Things to Consider...

PREPARE, PREPARE, PREPARE

- ▶ Try to ascertain whether there are hidden agendas or special personalities who will be involved
- ▶ Ask LOTS of questions
- ▶ Pay attention to the room layout and logistics

Things to Consider...the 6 Ps...

PRODUCT

PLACE

PROCESS

PARTICIPANTS

PURPOSE

PROBABLE ISSUES

Michael Wilkinson, Founder/Managing Director, Leadership Strategies

Things to Consider...

SET THE STAGE

- ▶ Describe process to be followed – for example, relate the Agenda to the VE Job Plan
- ▶ Obtain group buy-in of goals and objectives
- ▶ Create group memory using flip charts for reference throughout the workshop
- ▶ Create ground rules...???

Alternative to Ground Rules

Working Assumptions



1. Everyone has wisdom.
2. We need everyone's wisdom for the wisest result.
3. There are no wrong answers.
4. The whole is greater than the sum of its parts.
5. Everyone will be heard and will hear others.

Alternative to Ground Rules

**None of us is smarter
than all of us.**

Jim Rohn

quote fancy

Things to Consider...

- ▶ Use appreciative inquiry – frame questions in a positive light
- ▶ Suggest visualization to stimulate ideas: “Imagine the last time you....” – followed by “What did you wish could have happened or been done differently?”
- ▶ Open up the possibilities...ask the group, “If you, individually, could do anything at all to this “thing,” without constraints, what would that be?”

Things to Consider...

- ▶ Observe body language and respond appropriately
- ▶ Play “traffic cop” – use hand signals, physical position, verbal interruptions to prevent or stop disruptive behaviors
- ▶ Recognize that disruptive behavior usually comes with a cause of which you are not likely aware – ***it's not personal***

Things to Consider...

BRING 3 THINGS TO THE PARTY:

- ▶ **Knowledge** – working familiarity with concepts and methods of facilitation
- ▶ **Skills** – practiced ability to act on and carry out the appropriate actions
- ▶ **Self** – beliefs, values, life experiences all help determine our *ability* to use our knowledge and skills

Things to Consider...

TEAM DYNAMICS

- ▶ Use introductions to learn individuals' expectations and something personal about themselves
- ▶ Create a reason for a “group lunch” (maybe a project site visit)
- ▶ Use interactive team-building exercises

Things to Consider...

TEAM DYNAMICS

- ▶ Have the team members relocate to a different seat after a break, or on a new day
- ▶ Change your delivery method – flip chart vs. projection, different places in room
- ▶ Incentivize – use small rewards

Things to Consider...

COMMUNICATION

- ▶ Listen ***effectively*** – to both spoken and unspoken words
- ▶ Call on side-meeting members, politely, to share their thoughts and comments with the rest of the group
- ▶ Use humor when appropriate, and do so carefully

Things to Consider...

ADAPTABILITY

- ▶ Clarify misunderstandings of process – raise participants' comfort level
- ▶ Modify terminology if needed, e.g., “alternative” may not be appropriate in some environments (use proposal or concept)

Things to Consider...

ADAPTABILITY

- ▶ Back up and regroup if a direction change is needed based on new information or other
- ▶ Call a break and meet with the workshop sponsor to redirect the activities

Things to Consider...

DISMISS A PARTICIPANT?

- ▶ Be aware up front of strong personalities and/or hidden agendas
- ▶ Try to identify the cause of the participant's behavior
- ▶ Send the participant out to perform a specific task

Things to Consider...

DISMISS A PARTICIPANT?

- ▶ Have a private conversation with the individual
- ▶ Have a conversation with the individual's supervisor
- ▶ Last resort: excuse the participant from the workshop

Things to Consider...

WHAT NOT TO DO

- ▶ Spend the time while someone else is talking to plan your next statement
- ▶ Cross your arms in front of you when someone else is speaking
- ▶ Refer to your agenda to begin preparing for what's next while someone else is speaking

Things to Consider...

WHAT NOT TO DO

- ▶ Interrupt another speaker, unless it's to bring them back on topic
- ▶ Finish others' sentences for them
- ▶ Interpret or rewrite what someone else said
- ▶ Assume you know what someone's words mean

Things to Consider...

WHAT NOT TO DO

- ▶ Assume you know more about what's right for the client than the client does
- ▶ Guide the VM team to a predetermined outcome
- ▶ Do the team members' work for them

How Does One Learn Facilitation?

- ▶ Practice
- ▶ On-the-job training
- ▶ Reading and research
- ▶ Formalized training
 - 1-day courses
 - Multi-day courses
 - IAF Conferences



More Facilitation Information...



Member

- ▶ Member publications
- ▶ Worldwide conferences—next one in San Diego April 3-5
- ▶ Certification
- ▶ Training opportunities
- ▶ www.iaf-world.org

IAF Certification

Certified Professional Facilitator® (CPF®)

- ▶ Must maintain membership in IAF to become and remain certified
- ▶ Must pass assessment event – no courses, no written exams
- ▶ Must renew every 4 years

Questions?

*The basics of facilitation
are easily learned, and
provide a large measure of
meeting improvement*

Certificate of Attendance

Please contact Mikaela Tolf

mikaela@valueanalysis.ca

to request a certificate of attendance for one
(1) hour of participation