



# ECOLOGICAL FACILITATION

Starting point for exploring sustainable leadership

## #02 FEBRUARY 2011



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### ABOUT THE NEWSLETTER

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**Cover picture:** Schumacher College's Ecological Facilitation course is about authentic and sustainable leadership, using ecological systems as the inspiration for facilitating healthy social systems and workplaces. Participation and community is the ethos that underlies leading from a position of deep understanding and commitment to the challenge. Participants work together to ensure food is grown and prepared in a sustainable way, for example. (Photograph by Daniel Thistlethwaite, Schumacher College)

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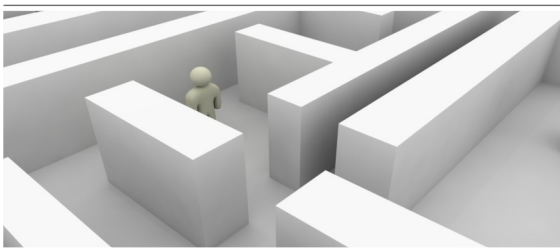
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Photograph by Daniel Thistlethwaite

# Ecological Facilitation:

## *A gritty and creative approach to leadership*

By Anna Lodge

**S**chumacher College is responding to an increasing need for new kinds of leadership and related facilitation skills focused on creating a sustainable future. The course “Ecological Facilitation: A gritty and creative approach to leadership” regularly brings together participants from a surprising range of backgrounds to learn and explore these practices together.

Combining radical and simple approaches to facilitation and drawing upon the broad experiences of the group is proving useful

beyond the confines of environmental professions. Participants can take learning from environmental practice in facilitation and apply it to any other context with remarkably constructive results.

Most areas of life provide us with motivation to explore alternatives. This change often needs the support of a facilitator or facilitators’ during the transition, which can be short term or a lifetime’s journey. The motivation for change that we at Schumacher College address is in response to ecological,



Photograph by Steve Marshall

social and cultural crisis', which has moved many people to change their lives or forced changes in organisations. Many people that we work with are responsible for engaging others in a response to the crisis and therefore find themselves informally or professionally in the role of leader.

As a result, we have been working to directly address the need for specific facilitation and leadership skills within the context of improving ecological awareness and the potential for change. As you might imagine, this course has proved very useful for those working in traditional education or consultancy roles. But beyond these roles are people working within communities, universities, permaculture projects, corporate departments and NGOs who are reaching out for a more radical way to address their responsibilities. What they have found through Ecological Facilitation is that the health of ecological systems can be used as

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## ***We are all, as individuals, a micro-example of ecological systems.***

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inspiration for facilitating healthy social systems, including work places. With this as a starting point, a new and much more sustainable leadership can be explored.

### **A new kind of embodied leadership**

Four questions are key to a new kind of embodied leadership that reflects and adapts to a new world where ecological limits are ever pressing:

- What forms of facilitation and leadership best reflect our intentions to work with a sense of non-material abundance and a

richness that works within the confines of ecological limits?

- How can we explore ecological and systematic perspectives within our individual roles as facilitators, and then help those we facilitate explore these too?
- What practices reflect, and therefore enable, a more 'eco-logical' way of being?
- What approaches to leadership support and model the change we seek to facilitate?

The course aims to prepare participants to work together to explore what practice fits, going beyond the individualistic and organisation-centred concerns to the wider and fundamental socio-ecological and cultural concerns which are now urgent.

The course's processes and tools reflect healthy, dynamic ecosystems, which we use as a logical and instinctive starting point to guide us in how to approach change and bring new leadership towards a sustainable world. This wonderfully creative and deeply challenging work brings new experiences and new insights to the process of change and the facilitation of that change.

We are all, as individuals, a micro-example of ecological systems. In this way our emotional engagement with the challenges we work with are important – part of our whole system. Through Ecological Facilitation, we have found that exploration of those emotional experiences can be deeply practical.

### Exploring emotional barriers

An acknowledgement of emotional barriers and opportunities has been, in some ways, more evident within a 'movement' such as environmentalism. However, as these barriers exist in all areas of dynamic human interaction, exploring them is a very worthwhile undertaking for those meeting any challenge. A facilitator helping a group develop its interest in some of the stickier and more complex barriers to change, such as those held emotionally, can provide essential insight and knowledge to move the group forward.

As well as using the real-life professional issues of participants, the course draws on some



Photograph by Daniel Thistlethwaite

cutting edge fields of ecology and social change, including complexity theory, deep ecology, participative democracy, and indigenous wisdoms. Over the last 20 years, Schumacher College has been working within areas such as these, some of which are new and fresh, combined with well established ideas. Each area can form an extensive narrative of its own but in combination, they generate very powerful explorations of what makes the planet and society work, and more urgently how to address the challenge of when they don't work – for example, our present ecological crisis.

In exploring the changes that are needed within any challenge or crisis, a number of approaches will clearly be needed. Because the natural world is the starting point for Ecological Facilitation, participants explore tools and conversations about leadership that are non-verbal, visual, and to do with being outside of the subject, as well as more well known contemporary methodologies such as Open Space. In this way, one can form new links with the course theme but also form a foundation of practice that is useful in



Photographs by Daniel Thistlethwaite (top) and Steve Marshall (bottom)

any area in which one is undertaking the role of leader and facilitator.

An exploration of process goes alongside the themes above:

- working with uncertainty and the unknown
- developing presence as a leader and facilitator
- working with nature
- resourcing ourselves in this work
- models and theory of radical facilitation as leadership

### Leading by example

As Schumacher College works on the basis that one needs to lead from a position of deep understanding and commitment to the challenge, the ethos of participation and community underlies our practice. Participants work together to ensure food is grown and prepared in a sustainable way, for example. Therefore, a way of life then translates much more authentically into how one works with others. Described in a different way, this could be 'leading by example' or 'authentic leadership'.

Because the central question of culture change drives this course, the response needs to be highly creative. Bringing together theories of ecology and social change with more experiential practices makes for a powerful transformative process to meet this challenge. While ecological change is what concerns participants of Schumacher College, it is also a radical approach that can benefit the broadest range of change practitioners.

Schumacher College is running the course Ecological Facilitation: A gritty and creative approach to Leadership 27 February – 5 March, 2011 and again, the same time next year. For more details: [www.schumachercollege.org.uk](http://www.schumachercollege.org.uk)

### ABOUT THE AUTHOR

*Anna Lodge leads on Communications at Schumacher College*

*[www.schumachercollege.org.uk](http://www.schumachercollege.org.uk), which provides individuals and groups from across the world with the opportunity to learn on numerous levels about subjects relating to environmental and social sustainability. Set within the vibrant Dartington Hall Estate in the South West of England, the College seeks to offer a positive educational space which integrates the concerns of governments, NGOs, businesses and individuals. Through a range of educational activities, participants are encouraged to consider some of the most urgent challenges of sustainability and to take responsibility for delivering effective solutions in their own working and personal environments. The context of individual and group learning provides a powerful platform for deep and holistic engagement with transformative learning for sustainable living. The College runs an extensive programme of short courses, two full time Masters courses, a green-skilling programme, and is developing its ability to deliver transformative learning online and through worldwide networks.*



Christiane Amici  
Raboud



Nille Skalts



Christine

## More smiles than tears at Geneva CPF assessment

By Pamela Lupton-Bowers  
European Regional Representative

Having just concluded the 2010 CPF event in Geneva, we are delighted to welcome the newest CPFs to the International Association of Facilitators:

Sandrine Delattre, Raj Ranal, Christine Zeigler, Christiane Amici Raboud, and Nille Skalts (who joined us from Denmark). We were delighted to be able to arrange the event and thanks go to Lindsay Wilson and Robert Verheule for the arrangements and assessment on the day.

The actual CPF event was held at Ecogia, the International Committee of the Red Cross in Geneva. One candidate, Christiane Amici Raboud, is the Director of the Centre and so could make sure that all the venue specifications were met.

It was a tough haul to make this happen. At first we thought we had 11 participants, which would have been great from IAF's cost benefit perspective, but finally we had six people who managed to meet the criteria and complete the documentation to a sufficiently high standard to be invited to the event. Five of them were certified on the day. We are delighted to almost double our number in Switzerland.

When I visited in the morning to wish them best of luck and deliver my signature chocolates,





Zeigler

Raj Rawal

Sandrine Delattre

Photographs courtesy of Pamela Lupton-Bowers

all six were already hard at work preparing for their practice sessions and the first two candidates were taking part in their first interview.

It was exciting to spend a little time with the group as they prepared their flip charts and room set up. As they worked, some of them wondered out loud what they had gotten themselves into. I left them to work, and returned at the end of the day.

Raj told me that they were very happy to have committed to the process, and said that “there were more smiles than tears and another group of newly qualified CPF’s were glad they had persevered and completed the baptism by fire.”

#### A diverse group

The multi-national participants represented Canada, Denmark and Switzerland, and included consultants, trainers and facilitators bringing experience from public, private and non-profit sectors.

The workshop sessions were equally diverse, ranging from addressing major budget cuts in one organization, a roundtable uncovering opinions around a smoking ban in Geneva, trying to reduce

duplication between humanitarian organizations operating in the Caucasus, a Dutch NGO trying to balance the privacy of its clients with government requests to access registration lists, trying to establish selection criteria for a new Executive Director, or the values that drive decision-making in a state social service.

Participants appreciated being able to see very different styles and techniques of facilitation and the challenge of being assessed and observed by four experts.

I returned later in the afternoon armed with champagne for the candidates and a bottle of wine for the assessors who I knew had not only endured a tough 10 hour day of assessing but faced a tough evening of finalizing feedback.

I think Raj summed it up well: ‘It was a great day - engaging, yet exhausting’. Special thanks go to the assessors, who worked the hardest of all, without pause for almost 11 hours. As one stated, ‘a key quality of an IAF assessor is the size of their bladder’.

Congratulations to you all, and looking forward to recommending you and working with you and alongside you in the future.

# Facilitating the *unknown* and *mastering* it

By Sona Karikova



Following my October newsletter article about “Facilitating the unknown”, I’d like to briefly take you through my study – its methodology and my main findings, the outcomes of the October workshop, and my future plans to build on the research into this interesting subject.

### Methodology

I chose the phenomenological research method, because it is perfectly suited for studies of phenomena which have not been researched in depth yet. Reliable and authentic data is gathered through one’s experience and inner thoughts with regard to the phenomenon that is being studied.

I was able to collect those insights from nine highly experienced facilitators and leaders in the field, who agreed to participate in my study. They answered a series of questions designed to gain in-depth insight into their own experiences of finding themselves in an unknown situation during facilitation which they had to master. Their answers were

analysed using interpretative phenomenological analysis (IPA).

### Findings

My study explores the facilitator’s inner processes and responses to the “unknown” during these unexpected and often challenging situations.

The “unknown” can happen at any time during the facilitation process and is unpredictable. My study suggests that the “unknown” arises from:

- Signs (emotions, feelings) of the facilitator’s inner processes (e.g. facilitator’s behavioural patterns, lack of confidence, identity issues, wrong intervention..)
- Signs (emotions, feelings) of the group (e.g. purpose/objectives of the workshop don’t meet the expectation of the participants, participants dislike the facilitator, participants are depressed, confused, angry, etc.)
- Signs of the external processes (e.g. the facilitator unexpectedly has health problems in the middle of the session, unexpected happenings occurring within the event such as the key person suddenly leaving, unexpected happenings happening outside the event – such as sudden shocking news - affecting the facilitator’s state)

The “unknown” can both bring genuine surprises and trigger the facilitator’s emotional discomfort e.g. fears, anger, vulnerabilities, nervousness, losing the balance which leads to difficulty in concentrating on others or focusing on what is really going on and so on. When experiencing such states, the facilitator’s effectiveness suffers, the facilitator struggles with diagnosing and timing the right interventions, the session may be slowed down, and important things may be forgotten.

### Self-talk

I wanted to go deep and touch the facilitators’ inner processes, their immediate feelings and thoughts when they found themselves in the line of fire. Whilst being impartial and objective is paramount in facilitation, I was surprised to find out how personal this can be and realized the complexity of the facilitation.

I learned that most of the facilitators are regularly engaged in an inner dialogue (self talk) that is triggered by facing the unknown. So whilst a





Photographs courtesy of Sona Karikova

facilitator may look calm from the outside, he/she could be experiencing an inner storm that needs to be managed and constantly monitored during facilitation and even long after.

The very first level of such inner processes originates somewhere in the facilitator's unconsciousness and is formed by early childhood experience, background, traumas, and energy type, followed by behavioural patterns and triggers. The facilitator begins with acknowledging these inner processes.

Self-awareness and alertness increases in order to balance the signs (emotions, feelings) affecting the facilitator. Learning about one's own psychology and being aware of the inner processes can positively influence the facilitator's self-development and ability to cope with these unknown situations/feelings.

### Coping Mechanisms

Facilitators use a wide range of coping mechanisms so they are able to "self-facilitate" the inner emotional state. I called these internal management CM and I divided them into three types:

- First type - **internal management CM** enables the facilitator to deal especially

with all the dynamic, unstable aspects of the facilitation processes.

- Second type - **internal management CM** enables the facilitator to manage more stable, desirable emotional state of himself/herself and the group.
- Third type - enables the facilitator to manage the facilitator's fixed behavioural patterns and triggers.

Facilitators also use a variety of CM which relates to and influences more directly the group processes - **external management CM**. It can be seen as intervening CM, which enables the facilitator to manage group expectations and to balance the group needs. There are other coping mechanisms which involve both, external and internal management.

### Importance of life learning

The facilitators often stressed the importance of life learning, which included: working on self-development, systematically attending workshops and seminars, constant development, looking for inspirations, trying new things, meeting motivational people, networking, and so on.



Photographs courtesy of Sona Karikova

Furthermore, after experiencing the “unknown”, most facilitators reflected on what happened. This not only enhances the coping ability but also strengthens the life learning experience, and so is very important and vital for facilitation. Moreover, constant life learning increases the facilitator’s confidence, especially important whilst facing the unknown.

The identified aspects **interact** with each other:

The facilitator’s coping mechanism directly influences mastering the “unknown” and his/her knowledge and ability to exercise and use the various coping mechanisms has a direct impact on the quality of the facilitation process.

Experiencing different situations/feelings will ultimately influence the facilitators’ life learning. A facilitator’s growing life experience and facilitation history builds confidence, leading to an ability to master his/her coping mechanism. Moreover, facilitators’ reflection also supports the aspect of life learning and understanding of the studied phenomenon.

The following diagram illustrates the complex interaction during the process of facilitating and mastering the “unknown”. I

believe these principles can also be applied in everyday life, outside facilitation.

### Workshop

After completing my research report, I hosted a workshop, “Facilitating the unknown and mastering it”, to explore the project. Ayleen Wisudha helped me organize the workshop, which was designed exclusively for the research participants. I was pleased when four of these talented facilitators found time in their busy schedules to join us and one facilitator, who lives in New Zealand, was able to participate online via Skype.

In the first part of the workshop, we focused on my research findings about facilitator’s coping mechanisms and unexpected situations of the unknown.

From an extensive list, the group chose to primarily discuss four situations – resistance of the group, situation when there is a need for a quick solution (elements of pressure, responsibility), aspects of the facilitator’s consciousness structure versus flexibility, and aspect of congruence within the facilitation process.

Whilst discussing my findings relating to coping mechanisms, the group focused on the following:

- managing own emotional state and being aware of outside conditions (step back and suspend judgement, trust the process and sense the situation)
- being prepared (but with flexibility by being present and in the moment) and
- coping mechanism of involving the group into the ownership of new directions.

In the second part, we explored “Finding the Common Ground” with the goal of identifying practical applications of my research. The group suggested that inexperienced facilitators would greatly benefit from this study.

I am personally interested in designing and developing a coaching and teaching tool that would allow facilitation students the chance to experience “unknown” in a safe environment. Also it would be interesting to practise the variety of coping mechanisms.

#### Future workshop

We are currently designing the first public workshop on this exciting subject. This time we will include lively examples and concrete stories of the facilitators who have allowed me into their inner world. To protect the privacy of my participants, we will of course change names etc.

We also plan to integrate role plays within the workshop, which will increase the awareness of practical utilization of my research and enable participants to experience “the unknown” in a safe environment. Such an approach could be beneficial for both inexperienced and experienced facilitators, for whom this event will be useful as a platform for exchanging experiences.

I also welcome academics and professionals from other fields who are interested in new perspectives. I believe in cross fertilization and would love to explore this subject with people who deal with crisis and stress management, e.g. mediators, negotiators, life coaches and of course, students.

We hope that our workshop will enrich your own life learning experience. If you want to be updated about the dates of this event, please contact me at

s.karikova@my.westminster.ac.uk.

#### ABOUT THE AUTHOR



*Sona Karikova completed her M.Sc. program in business psychology at the University of Westminster in London last year, and as part of that program, explored her special interest in facilitation, individual and cultural differences, and negotiation. Her dissertation, supervised by Ayleen Wisudha, was dedicated to the facilitation profession. Sona promised to keep us up to date with her research after first explaining it to us in an article entitled Facilitating the unknown and mastering it, published in the October 2010 IAF Europe Newsletter.*

*Sona moved to London more than four years ago for a short stay to improve her language skills after graduating with a Social Education degree in Slovakia but, inspired by the city, decided to stay.*

# Denmark's first Facilitator Get Together

By Louise Werner Gielsager

In the spring of 2010, Spark and the Danish School of Education, University of Aarhus (DPU) decided to put professional focus on the field of facilitation in Denmark. We wanted to explore the variety within the field of facilitation and start configuring the elements.

The idea of the very first Facilitator Get Together emerged, and became a reality on December 7, 2010. The intention was to host a half-day conference with expert input and discussion on facilitation, and extensive debate about organizing and professionalizing the field of facilitation in Denmark.

We were pleasantly surprised at the interest and participation, as 237 people from very different walks of life signed up and met at the very first facilitators get together in the DPU ballroom! The representation was a grand

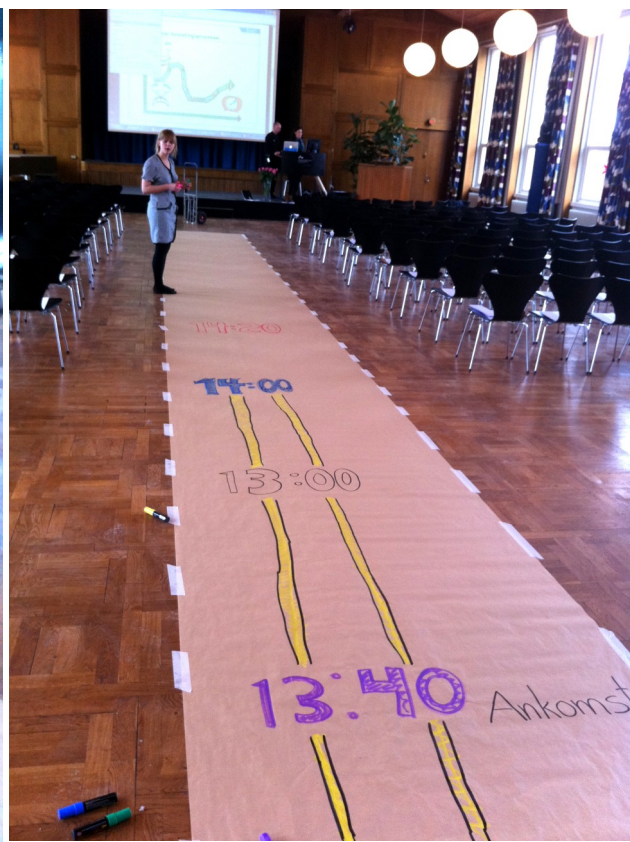
mix of facilitators of all kinds: internal consultants from IT, HR, learning, management consultants, leaders, researchers, project managers, and many more. All were united by the burning wish of networking, interacting and assembling the field of facilitation in Denmark.

## Tool for constructive social development

The first presentation, Facilitation, a Tool for Constructive Social Development, was given by Ib Ravn, Ph.D., an Associate Professor at DPU. With equal parts humour and earnestness, he talked about facilitation as a means for ensuring objective, meaningful, and effective processes in human interactions and meetings of all kinds.

From seeing facilitation mainly as an isolated and sometimes expensive consultant

Photographs courtesy of Spark





Photographs courtesy of Spark

service, he suggested, we need to move to seeing facilitation as a dynamic, participatory process of reaching collaborative results that is used by every manager and in every single everyday meeting.

Ib also advocated the idea of developing facilitation as a qualification for human interaction in civil society and the democratic process, so that facilitation would ensure a higher and more meaningful output from all kinds of public meetings, including residents' meetings, school meetings, demonstrations, and even the social life at receptions, dinner parties and weddings!

#### **Design and Staging change processes**

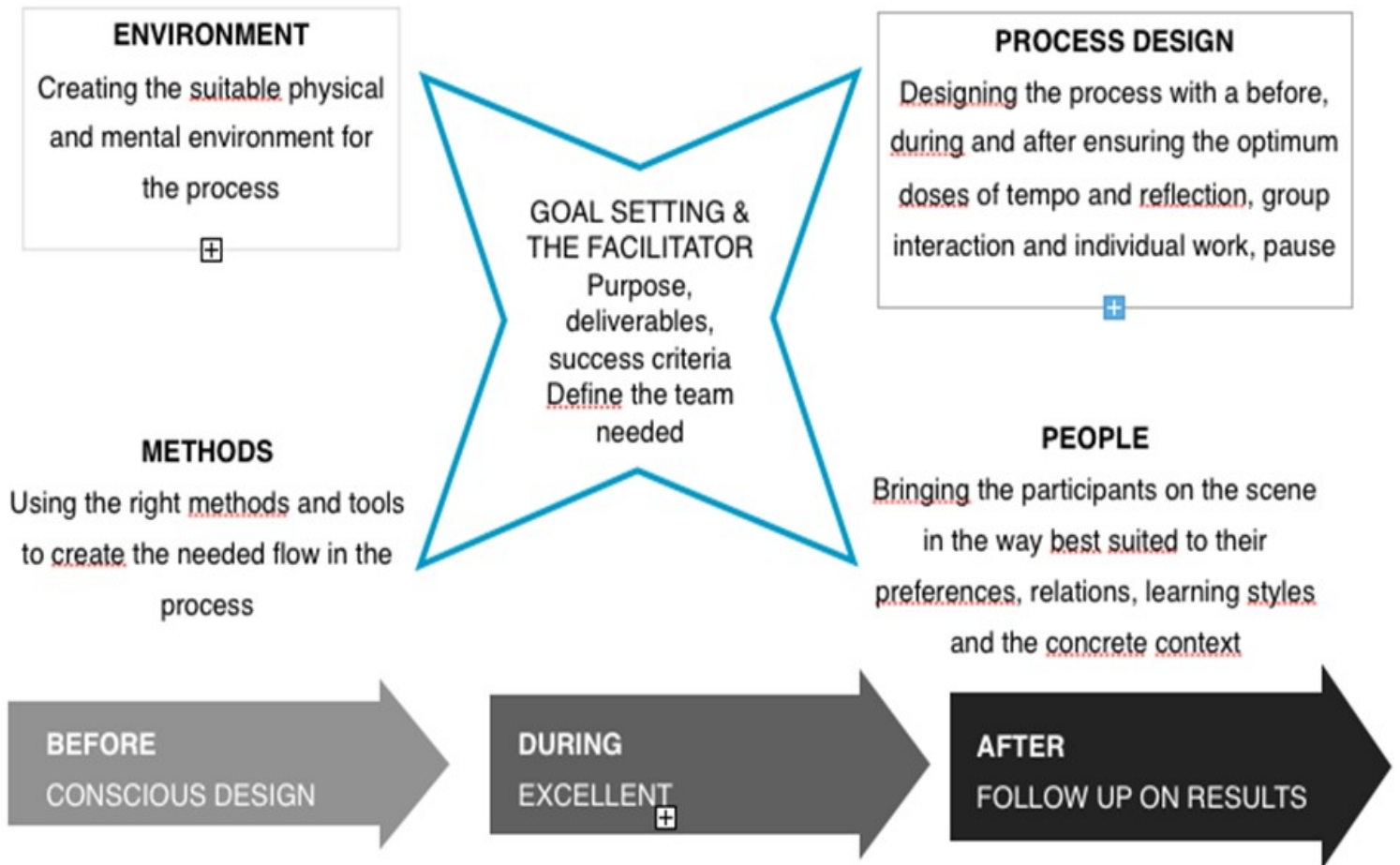
Spark's Zakia Elvang gave the second presentation, Design and Staging, on what it takes to make a good facilitator and what's needed to run meetings and processes to achieve meaningful results.

Social interaction is a process that takes place before, during and after the actual event, and Zakia presented different perspectives on how designs serve as platform for shaping meetings between people and especially on how specific, detailed designs can catalyze meaningful and effective processes.

Zakia introduced the design STAR model as a step-by-step approach for shaping, planning and preparing processes of human interaction with a professional purpose. Based on purpose and success criteria for the facilitative process, the design STAR includes considerations about process methods, process designs, people, and environment.

Subsequently, the attendees were asked to reflect in pairs, on their own designs of successful processes and how conscious design creates value. The debate was lively and interesting perspectives were shared.





*Designing State of the Art Processes*

### What turns you on?

After all the listening, Nille Skalts from Spark facilitated a giant, lightly adapted 'Open Space' process that aimed to establish and share what is on the minds of Danish facilitators.

The session began with a full-blown +200- people theme generation where all participants added something they particularly wanted to discuss with their peers. Then the issues were sorted dynamically, and regrouped into different themes, including:

- Facilitating of powerful meetings
- Facilitation and cultural differences
- Facilitation and learning / education / competences
- Facilitation of networks and volunteers
- Everyday facilitation - small meetings in daily work
- Facilitator roles and skills
- Virtual facilitation

- Theory and research in the field of facilitation
- Facilitation and innovation and creativity
- Facilitation of vision and strategy

As the 'law of two feet' applied, and as participants went to the themes where they sensed they could participate, gain insight, or share, lively discussions ensued.

### Facilitation's future - association or self-organisation?

In the evening, 45 participants chose to stay and discuss the future organization of the field of facilitation, and the seeds of future activities were sown. Again, the participation was characterized by desire, energy and joy at being in the company of like-minded peers, and a strong interest in continuing to build the exchange.

The Danish chapter of IAF also participated, telling us about their work, introducing the opportunity of providing



Photographs courtesy of Spark

certifications in Denmark, and the IAF conference is coming up in the autumn.

The vision of the 45 participants was to establish a self-organized and vibrant forum of people interested in facilitation. The first concrete outcomes from the Facilitation Get Together were:

The creation of a virtual platform on the Linked In Group: Danske Facilitatorer. The LinkedIn group is expanding every day, now counting more than 450 participants, and experience, articles and ideas are being exchanged.

The decision to organize a new Facilitator's Get Together in 2011 and a fast forward on self-organisation, so already a variety of different 'sub-get togethers' are being launched.

One group is meeting on the subject of 'Theory and facilitation' in March

One is planned on 'Virtual Facilitation' in February

Spark has invited all to a Facilitator's Jam session in February, on 'Design and Facilitation, What is it?', using the format of the old jazz jam sessions from the 1920s - come and share new material, listen and be inspired. Nine jammers are already listed on topics as varied as 'Brains and facilitation', 'Facilitation and rhythm', 'Facilitative stories'...

If you are in Denmark, look for more info on [www.sparkcph.dk/blog](http://www.sparkcph.dk/blog)

For photos from the Facilitator Get Together. See [www.sparkcph.dk/flickr](http://www.sparkcph.dk/flickr)

## ABOUT THE AUTHOR



*Louise Werner Gielsager is working in the field of facilitation, learning and development, with special focus on strengths, potentials and good work life. As a part of Spark she helped ensure the logistics and the smooth running of the Danish Facilitator Get Together in December 2010.*



# Method of the Month: The Project Tree

By IAF Methods Database

Photograph courtesy of Jan Lelie. See [www.mindatwork.nl/methoden/Voorraad%20van%20methoden.htm](http://www.mindatwork.nl/methoden/Voorraad%20van%20methoden.htm) for description of methods and techniques in Dutch.

This month's method was inspired by a workshop for IAF Benelux led by Jan Lelie and Annet Noordik earlier this month. This is a convergence approach, here aimed at establishing in a somewhat playful way the relationships among various parts of a team's action plan. I hope it's as helpful (and fun) for you as it was for us!

**Purpose**

To enable a group to analyze together how the different parts of their plan relate to one another before moving to a timeline.

**Steps**

**Preparation:**

Have the group create cards, one for each event in their plan. Draw on a very large sheet of paper (two or three pieces of flipchart paper taped together and mounted on the wall) the outline of a tree, including roots, a broad trunk, branches, leaves and fruits.

**Process:**

Ask the group to mount the steps of their plan onto the tree. If there are more than five people, divide them into subgroups.

- Roots - Which items need to be accomplished first before the rest can begin?
- Trunk - Which items are the project's core activities, and will need to keep on throughout the process?

- Branches - Which are separate lines of work that can operate independently?
- Leaves - Which items make the whole plan attractive and can change as needed?
- Fruits - Which items achieve the goal of the plan, what the rest is aimed to achieve?

As members go along, they may need to create additional cards for project items thus far forgotten.

**Reporting:**

Have someone describe how the tree lives, starting with its roots and moving out towards its fruits. Group members may add to each other's descriptions.

Close with the question: What are some things that could help nourish this tree?

**ABOUT THE AUTHOR**

The IAF Methods Database is an open platform for exchange of methods for group facilitation and can be found at [www.iaf-methods.org](http://www.iaf-methods.org). This site is maintained under an agreement with the International Association of Facilitators for the purpose of aiding in the development of the profession of facilitation. You can subscribe to the monthly newsletter, and contribute your own methods to the Database.

# The big slow down:

## *Facilitation design considerations when partially abled*

By Gillian Martin Mehers

Just before Christmas, in an insanely busy airport of holiday travellers, an extremely tight connection found me jumping up and down, wildly waving at the large window beside the closed gate trying to get the pilots' attention - I could see them in the cockpit fiddling with their papers, the plane on the tarmac, the gate still connected, so I thought no hurt in trying.

I was getting nowhere when a passing security guard with some holiday spirit took pity on me and called down. They miraculously opened the door and I flew down that ramp - focused on that little open plane door at the bottom, the two anxious flight attendants holding it open, and not the big seam in the ramp floor in front of me.

My magnificent trip over that seam produced a lateral movement that only ninjas and some desert snakes can make safely. Not being either of those, I managed to tear the anterior cruciate liga-

ment in my right knee. Now in a leg cast for six weeks, I can walk but that snake and most people would leave me in the dust.

And I am thinking about what I need to do to modify my facilitation work to take into consideration the fact that I am incredibly slow and only partially able. I cannot run up and down steps, or from room to room, in 2-minute intervals. And I cannot be carrying around 50 kilos of workshop materials, can't bring that extra flip chart, or move the tables and chairs in the rooms from a U-shape to cabaret style in the 30 minutes before we start (because we asked but for some reason the venue didn't do it).

Even getting back and forth to events must obligatorily be done on public transport or with the private chauffeur, also known as a full-time working husband.

My first event in the New Year is mid-January and we are working on the interactivity and activity design now. We will have around 400 people in Paris at a planning event for an international water forum happening next year. What do I need to do differently now, so that when I get there, cast and all, I will still be able to do a great job.

This is a good thought experiment in its own right - this might be a temporary condition for me (hopefully!) but for others it might be status quo, both for facilitators and potentially for some of the participants.

Here is a list of what I think I need to know and do to facilitate with my leg in a cast (and probably should know anyways!):

### **Transport: Slow and Virtually Hands Free**

- Can I get there by public transport? How long will that take? What changes do I need to make (train to tram to bus)? Where are there steps or lifts or long walks? I am usually in the venue at least 60-90 minutes in advance for set up, can I get there in time? Can the day start a little later,



and go later - what is the flexibility with the start and stop time if needed?

- If I need to be driven, can we park close enough so that I can carry the materials to the venue? Can I offer someone else from the team a lift to help carry?

#### Venue: Steps and Who Can Help

- Occasionally I look at the floor plan for the venue if it is large (and available) but normally I don't. Now I would like to know - how far is the room from the entrance, how far apart are the breakout rooms, how far is coffee and lunch from the workspace?
- If I am working in a plenary auditorium space, is there a stage area with steps? Can I either start and stop up there, or can I do all the talking from the floor (better)? Is there a wireless mike I can use?
- I won't be able to fix or move things myself, or run for more this or that. Who is in charge in the partner organization just in case, do I have her/his mobile phone number? Who is in charge for the venue, do I have that contact information?

#### Agenda: A Little More Leisurely Than Usual

- Is the agenda perhaps a little too tight, are breaks and transitions short? Can the pacing in the design be a little slower and less choppy in terms of rooms changes - more gastropod and less hummingbird? (This reminded me of one of my own blog posts recently about not overdoing interaction: Too Much of a Good Thing.)
- Where do I need to be when? Can I minimize my own running around by putting other people in charge of certain rooms and spaces? (For the mid-January event, I will be working with 4 other Facilitators, can I assign them the furthest rooms? Are they happy with these extra "fitness" benefits?)

#### Workshop Rooms: Where Can I Sit?

- How is the room set up? Do I need to reserve a seat in the auditorium for myself at the front by the microphone so I don't have to walk up and down the steps to speak?
- In the workshop rooms, can single chairs be put here and there to sit on while I am not facilitating? This is a funny one, I noticed at a recent workshop there were exactly enough chairs for the participants and not one extra, so I spent

the whole day standing (until the participants were standing -then I was sitting in their seats!) Make sure to have more than one extra chair around the walls, as late comers (both at the start, but also after each break and lunch) will always take the single chairs in the back/side rather than moving people to sit in the middle.

#### Communicate: Tell People

- I need to tell people, especially the other facilitators asap about the fact that I will be wandering around, slowly, in a full leg cast. They will have good ideas how to be as efficient as possible with a partially able team member.
- Communicating about how it is going during the event will also help people understand why I might opt out of the group dinner, dragging a leg and cast up and down the steps all day will probably be incredibly tiring.
- At the same time I need to be as self-sufficient as possible, believe me I will be wearing something with as many pockets as possible, stuffed with pens, markers, etc. things I normally have to continually walk around to find when I need them!

#### ABOUT THE AUTHOR



*IAF Europe Newsletter columnist Gillian Martin Mehers is director and head of learning at Bright Green Learning @Atadore SARM, in Crans-près-Céligny, Switzerland. She blogs regularly about facilitation and learning at [www.welearnsomething.com](http://www.welearnsomething.com).*

*You can read and comment on this post online at <http://welearnsomething.blogspot.com/2010/12/big-slow-down-facilitation-design.html>*

*You can reach Gillian at [gillian@mehers.com](mailto:gillian@mehers.com).*

# Schuman's Rules of Problem Solving

By Sandor Schuman

When I lead workshops on collaborative problem solving and decision making, I often refer to my “Rules of Problem Solving.” Here they are:

## **Don't be sure you have the right problem or purpose.**

It is often useful to have a clear description of the problem and a statement of the purpose of the project or meeting. But sometimes the originally-stated purpose turns out to be unsatisfactory to some of those who become involved. So it's important to be ready to modify the problem or purpose to accommodate those perspectives.

An Example: The new Research Director was alarmed at the high overhead costs and low utilization rates of his analytical chemistry laboratories. At a time of tight budgets, this was not sustainable. He hired me to facilitate a Study Team whose purpose—stated in a well-crafted “charge to the study team”—was to “recommend an optimal organization plan.”

Armed with this purposeful document I felt confident in my ability to facilitate the group.

At its first meeting, members of the Study Team were outraged! The Director did not understand the particular natures of their laboratories or the conditions under which they operated. After considerable storming, I asked the group to suggest changes to the Director's “charge to the study team.”

They supplemented the above purpose statement to read “recommend an optimal organization plan that takes into account the commonalities as well as the differences among the existing laboratories” and made several other changes to take into account a broader range of issues, such as “how overhead charges and allocations are determined,” and “how decisions should be made regarding which equipment should be purchased.”

Now it seemed we had it right, but as the project proceeded, I kept wondering, do we have the right problem?

### **Don't be sure you have the right people.**

The people who participate in a collaborative effort make all the difference in its effectiveness. Who should be involved, and how and when they should be involved, are critical questions. If you don't have the right people, you might not even obtain an adequate understanding of the problem.

An Example: I was asked to facilitate a meeting in a hierarchical organization in which a supervisor and subordinate employee had a longstanding conflict. There were about a dozen people in the room, and we all introduced ourselves.

As the facilitator, I restated the organization's formal ground rules for such meetings and ascertained that everyone understood and agreed to them. We then proceeded to hear from the employee about the nature of the conflict and what she wanted by way of resolution.

A number of people asked clarifying questions and contributed supplementary information. After a series of questions to the employee from one particular person, the employee asked that person, "What are you doing here anyway? Are you collecting information to be used in a legal proceeding?"

The person denied that was the case (this was not allowed by the organization's ground rules), but it was only from the ensuing discussion that I came to realize two important things: first, that the person who had been asking questions was a lawyer in the employee relations division, and second, the supervisor

who was involved in the conflict was not even present!

At this point, the employee and her colleagues left the meeting, but if I had realized that one of the key individuals was not present, I would not have agreed to proceed with the meeting in the first place.

So the meeting was a failure, and made no contribution to improving the workplace relationships. It could have been avoided if I had the presence of mind to ensure that the right people were present.

### **Don't be sure you have the right process or method.**

When we plan problem-solving and decision-making processes, we have to make assumptions about the nature of the problem and the purpose that the group wants to fulfill. Sometimes the assumptions we make are on the mark, and the plan works effectively. Sometimes we have to change the plan, even drastically, building on what we learned up to that point.

An Example: The purpose of the Railroad Bridge Underclearance Committee was "to determine an appropriate standard for the vertical clearance of highway bridges over railroad lines." This was important and timely since several major highway construction projects were about to get underway and many highway bridges would be rebuilt. If at any time in the next 75 years they were to be rebuilt to provide the higher clearances that would accommodate new types of rail shipping equipment, now was the time to do it.

As facilitators, we recommended that the Committee use a systematic matrix evaluation method. First, we worked with the Committee to

establish a set of evaluation criteria. Second, we asked them to list the alternative clearances—18 feet, 20 feet, 22 feet, etc. Third, we asked them to describe each of the alternatives on each of the criteria.

As we worked with these experts through a two-day decision conference it became apparent that this form of analysis was not enough. Indeed, the performance of a particular alternative on a specific criterion varied, depending on the railroad. For example, increasing the clearance to 22 feet on a railroad that ran through a sparsely populated section had little impact on the cost criterion, but a big impact on cost for a railroad that ran through a densely populated area.

Towards the end of the conference we shifted to a resource allocation method that looked at the benefits and costs for each of five different railroads, and selected the alternative clearance that provided the highest benefit/cost ratio for each.

While the method we choose is a function of both the people and the purpose, it is useful to consider multiple methods, select the best fit, and still be ready to switch during the meeting if it seems appropriate.

#### Some additional thoughts.

You don't know who the right people are until you have the right problem, but then, it's the people in the room who ultimately define the problem! So the people and the problem define each other in an iterative process. And proposing a process or method often helps to clarify the problem, which in turn helps to clarify which people should be involved. They're inter-related and inter-dependent.

Lastly, it would be more positive to state these rules in the form, "Be sure ..." instead of "Don't be sure..." But it could create a trap. If I am sure that I have the right problem or purpose, the right people, and



the right process or method, then I am less open to discovering that I do not have them right.

Collaborative problem solving and decision making is sufficiently complex and dynamic that being close-minded about such things can lead to failures. So it's important to proceed with an open mind and consider that even these fundamental aspects of a collaborative activity might be subject to change.

#### ABOUT THE AUTHOR



*Sandy Schuman is a group facilitator, collaborative process advocate, and storyteller. He helps groups create shared meaning, make critical choices, and build collaborative relationships. He has been helping organizations work more effectively to solve complex problems, make critical decisions, and work together more effectively for more than thirty years. He blogs regularly about facilitation at <http://sschuman.blogspot.com/>*



## Getting ready for 2011 IAF Europe Conference in Istanbul, Turkey



*Photograph by Ben Richardson*

The local planning committee is already working with Entendu to organize a spectacular conference in Istanbul, Turkey, Oct. 14-16, 2011. Ben Richardson was in Istanbul earlier this month to meet with the local committee. Rengin Akkemik, who is leading the local planning, will be telling us more in next month's IAF Europe Newsletter.

## Welcoming Robert Verheule

We are delighted to welcome experienced facilitator Robert Verheule to the IAF Europe team. Robert was selected from the list of people who responded to the recent election process which asked for interest in the board positions and other officer positions in the organization. Robert is both a CPF and IAF Assessor. He was part of the group that set up the Dutch certification process and so is in a unique position to help us both with driving the CPF process in Europe, and in increasing access to CPF for non English speaking facilitator communities. We thank Gary Austin for filling in for a temporary period to help with the organization of the Helsinki conference, and we are very happy to have Robert ready to jump in immediately to support Ben Richardson, Rengin Akkemik, and the Turkish team as they plan the Europe Conference in Istanbul October 14-16. A more detailed profile of Robert will be included in next month's newsletter.



# Happy New Year!

By Martin Gilbraith, IAF Chair – in Manchester, UK



Happy New Year from the new Chair of a renewed IAF global Board. I feel proud and privileged to have the opportunity to serve our Association and our profession as Chair of the IAF Board for 2011 and 2012.

I have been a member of IAF since just 2007, but have attended I think 10 IAF conferences (in Europe and North America to date) since my first in 1997. In 2008 I earned the IAF Certified Professional Facilitator designation, and also in 2008 I was appointed to the IAF Board. I served first as Regional Representative for Europe, and then was appointed as Vice Chair for 2010.

My background in facilitation is in the international community & organisational development work of the Institute of Cultural Affairs (ICA). I was first trained in ICALs ToP facilitation methods (the Technology of Participation) as part of my international volunteer induction training with ICA in 1986. I have worked with ICA:UK since 1997 – see [www.ica-uk.org.uk](http://www.ica-uk.org.uk). As Chief Executive, the focus of my day job is the management and governance of ICA:UK as a charity and a social enterprise, but I also provide facilitation, training and consulting services, largely with public and voluntary sector clients nationally in the UK.

I think of my professional interests and goals in terms of facilitative leadership, where facilitation, management and governance intersect – so I have sought volunteer roles as well that have allowed me to explore and develop in that area, including as Board member and Treasurer of ICA International from 1998-2006.

I am viewing my role as IAF Chair primarily as providing facilitative leadership to the Board – in order that we may best, collectively, provide facilitative leadership to the Association as a whole, and in order that IAF may best provide facilitative leadership to our profession and indeed to the world at large.

I would describe this facilitative leadership role in terms of:

1. Developing and promoting collaborative relationships through clarity, transparency and accountability - within the Board, within the IAF as a whole, and between

IAF and its external partners and stakeholders

2. Adopting, communicating and applying appropriate group processes, notably IAF policies and procedures, and also structures
3. Sustaining and enhancing a participatory environment that is inclusive of diversity, encourages creativity and innovation, and manages conflict
4. Ensuring appropriate and useful outcomes through development and implementation of effective strategy
5. Building and maintaining professional knowledge, around association management and governance as well as facilitation
6. Modelling a professional, facilitative leadership approach at all levels

I am excited to be starting my term as Chair with a strong and committed new team of Board members to work with, and to see them energetically acquainting themselves with their new roles. I am keen to enable the new Board to form, and indeed to perform, as quickly as possible; so I am delighted that we will be meeting face-to-face this year in January.

At our January Board meeting we will articulate our work plan and budget for the year ahead, and during the year we will use this newsletter and other means to communicate and engage with you, the members of IAF, on progress, challenges and opportunities for involvement.

Please get in touch with me, or any of your Board members, to share your questions, feedback or suggestions; now and throughout the year. You can email me at [iafchair@iaf-world.org](mailto:iafchair@iaf-world.org), skype me at [martingilbraith](https://www.skype.com/user/martingilbraith), and connect with me at <http://uk.linkedin.com/in/martingilbraith>. You can find details for all IAF Board members, and their roles, at [www.iaf-world.org](http://www.iaf-world.org).

*This is an abbreviated version of a longer article that appeared in IAF's Global Flipchart, January 2011.*

# Membership fees change

By IAF Europe Office

As noted in the December/January Newsletter, the IAF Global board decided to increase membership fees as of 2011, and these changes came into force on 1st January 2011. The IAF Europe Office has changed the Sterling and Euro member fees to reflect the US Dollar increases. The new rates are listed below.

Membership Type	When paying via the Global Website	When paying through the IAF Europe Office	
	US Dollars	Sterling	Euro
Classic - One Year	\$ 195.00	£ 127.00	€ 148.00
Classic - Two Year	\$ 365.00	£ 237.00	€ 278.00
Classic - Three Year	\$ 510.00	£ 331.00	€ 388.00
Developing Country Member	\$ 90.00	£ 58.00	€ 68.00
Student Membership (By agreement)	\$ 90.00	£ 58.00	€ 68.00
Senior Membership	\$ 135.00	£ 88.00	€ 103.00
Group Membership (5 – 14 members)	\$ 170.00	£ 110.00	€ 129.00
Group Membership (15+)	\$ 145.00	£ 94.00	€ 110.00
Affiliate Member	\$ 185.00	£ 120.00	€ 141.00

The board also decided to end the offer of a lifetime membership option and thus this option is no longer available to new applicants. Existing lifetime membership holders will continue to enjoy all the privileges and benefits of that option in the normal way. Please feel free to contact the IAF Europe office if you have any questions regarding membership; we are based in the United Kingdom and thus our working day is scheduled around normal European working hours.

For those of you joining or renewing your membership, we are able to accept funds in a number of convenient ways, including payments by cheque, standing order or bank transfer. In the near future we will be able to

take payments by credit/debit cards online through the IAF Europe website. The SEPA (Single Euro Payment Area) legislation means that many of you will be able to arrange a standing order payment through your bank so that you will no longer have to worry about making annual renewal payments. We are happy to provide you with information on how to do this.

If you have any questions about your membership or any other matter relating to the IAF in Europe, please do not hesitate to the IAF Europe Office at [office@iaf-europe.eu](mailto:office@iaf-europe.eu). You can also reach us by telephone at +44 (0)1923 400 330, fax +44 (0)1923 620 320, or by post at Box 529, Kings Langley, United Kingdom WD4 4AD

## Follow IAF on Twitter

Bill Reid, who is the new IAF Global board member responsible for Communications, has got IAF registered on Twitter so you can follow IAF activities and also spread the word about IAF by retweeting the IAF tweets. You can follow IAF activities at <http://www.twitter.com/iafacilitators>

## Virtual event provides practical advice for facilitators

Do you get called into organisations when the going gets rough? Do you need to stay calm no matter how hard the economic storms, winds of change, or squalls of human relationships your clients face? Do you stand alone in the face of these storms?

The 'Riders on the Storm' summit will provide practical advice you can implement immediately in three key areas—how to help your clients deal with the storms they face; how to look after your own well-being as you ride the storms; and how to develop your business in stormy times.

The virtual summit will be held from 28 February to 4 March and will feature online interviews and discussions with a line up including Christine Thornton, author of *Group and Team Coaching*, Martin Kalungu-Banda from the Presenting Institute, David Molian, from Cranfield University's Business Growth Programme, Claire Tyler, Chief Executive of Relate, and Carol Sherriff and Simon Wilson, Directors of Wilson Sherriff, and members of the IAF.

Sign up to the virtual summit is free, at [www.ridersonthestormsummit.co.uk](http://www.ridersonthestormsummit.co.uk)

## Welcome, new and returning members

*(December 2010 and January 2011)*

We would like to warmly welcome the following new members who joined IAF in December and January:

- Albéric Augeard, Belgium
- Neil Gowans, United Kingdom
- Wiebke Herding, Belgium
- Kristina Malther, Denmark
- Alper Uktu, Turkey
- Christian Valentiner, Norway

We also want to welcome back returning members who renewed their IAF membership in December and January:

- Pawel Dabrowski, Poland

- Carolina de Monchy, Netherlands
- Daniël De Roo Van Alderwerelt, Belgium
- Trevor Durnford, Sweden
- Fred Frowin Fajtak, Austria
- Jan Haverkamp, Czech Republic
- Sieglinde Hinger, Austria
- Paul Manders, Netherlands
- Jacqui Moorhouse, United Kingdom
- Erik op ten Berg, Netherlands
- Monica Puel, Italy
- Holger Scholz, Germany
- Katherine Woods, United Kingdom

## Facilitation Workshops and Meetings 2011

Find out more details about specific events listed here by visiting the Workshops and Meetings section of the IAF Europe Forum (<http://www.iaf-europe.eu>) if you would like

to let others know about an event you are organizing, please email [rosemary.cairns@iaf-europe.eu](mailto:rosemary.cairns@iaf-europe.eu).



**FEBRUARY 2010**

- Group Work Skills, Feb. 2, Manchester UK (ICA:UK)
- Introduction to Group Facilitation, Feb. 15, Manchester UK (ICA:UK)
- CPF Certification United Kingdom, Feb. 16, Watford, England (IAF)
- Group Facilitation Methods, Feb. 16-17, Manchester UK (ICA:UK)
- Anecdote's Storytelling Workshop, Feb. 16, London (Anecdote)
- Participatory Strategic Planning, Feb. 24-25, Belfast, Northern Ireland (ICA:UK)
- Ecological Facilitation: A gritty and creative approach to leadership, Feb. 27-March 5, London, England (Schumacher College)

**MARCH 2011**

- Using Strength-based Approaches For Personal and Organizational Change: Theory and Practice of Appreciative Inquiry, March 3, 4, 11, 21 and April 8, London England (Anne Radford and Malcolm Westwood)
- Group Facilitation Methods, March 15-16, London, UK (ICA:UK)
- CFOR Facilitation for Leaders, March-December 2011, 4 modules, London England (CFOR)

- Change, Presence and the Art of Leadership, March 27-31, Findhorn, Scotland (Robin Alfred and Gill Emslie)

**APRIL 2011**

- Group Facilitation Methods, April 5-6, Manchester UK (ICA:UK)
- Action Planning, April 7, Manchester UK (ICA:UK)
- Faciliteringsdagarna, April 7-8, 2011, Gothenburg, Sweden (Malin Moren and Jonas Roth)
- Group Work Skills, April 12, Manchester UK (ICA:UK)
- CREA Conference Apr 13-17, Sestri Levante, Italy

**MAY 2011**

- Group Facilitation Methods, May 3-4, Taunton UK (ICA:UK)
- Group Facilitation Methods, May 4-5, Gateshead UK (ICA:UK)
- 2nd European Open Space Learning Exchange, May 17-20, Cagliari, Sardinia, Italy
- CPF Certification (Dutch), May 26, Rossum, The Netherlands
- Loving Work - Loving Play, May 28-30, Findhorn, Scotland (Patch Adams)

