

Building bridges

the facilitator's role in developing learning capacity

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Effective facilitation achieves group goals, through processes of problem-solving, decision-making, conflict resolution, innovation and change. However, facilitation also offers a hidden benefit: the development of Learning Power. A ten-year research project from the University of Bristol identified seven key dimensions of effective lifelong learning and created and validated a profiling tool for them. This article explores how the techniques used by excellent facilitators can support the development and application of these important dimensions of personal and group learning.

Keywords

learning power, excellent facilitators, pattern recognition, norms, seven dimensions of learning, Effective Lifelong Learning Inventory (ELLI)

Introduction

From time to time, many of us in the field of management education find ourselves in complex, even contradictory, roles. Within a single intervention with a group – a ‘facilitated’ session to achieve a pre-determined goal or outcome – we may move from pure facilitation into a recognition of the need to coach, provide specialist expertise or mediate between members of a diverse group who are in real or potential conflict.

However, while contexts may differ, the outcome of successful facilitation almost always requires participants to change something. Changes range from internal and personal - seemingly intangible attitudes, values and perceptions - to much more tangible changes to systems, processes and plans. When we facilitate groups involved in change, whether individual or organisational, we are almost inevitably working with people who are engaged in a learning process.

For me, the key to success in facilitation is not only that the facilitation process achieves its short-term goals. An equally important benefit is that the participants have also understood more about the learning process they have engaged in, and are able to draw on that learning in future in order to be more effective decision-makers, problem-solvers, innovators, leaders or team members. This meta-cognitive skill, which is often developed through experiential learning or using the principles of Action Learning, builds confidence and capability and allows learners to take more responsibility for their own future learning. This article outlines how, drawing upon the work of Crick et al (2004), I seek to facilitate my clients’ capacity to develop

such learning, especially through working with the notions of patterns, norms and the seven dimensions of learning.

Pattern recognition, evaluation and re-shaping

A simple way of thinking about how to develop learning capacity for change is to recognise that, as facilitators, we are working with patterns: either making new ones or helping to break or re-shape old ones. These patterns may be of behaviour (individuals or groups responding in familiar ways when faced with similar situations), of thought (following a trusted type of thinking, for example an analytical, step-by-step problem-solving process) or in relationships (such as one individual assuming control over others, the same individuals forming predictable alliances, or key players engaging in repeated argument).

When I am facilitating a group process, I often choose to focus on patterns that I observe in the group. For example, I might recognise a pattern of interactions that suggests where power in the group lies, or a pattern of almost reaching a decision and then backing away from it before making a final commitment. At this stage in the process, the core skills that I rely upon are those of listening and observation. I may do no more than make a mental note of any pattern that seems to be emerging and its observable effects on the process in which the group is engaged.

Once I have noticed these patterns, my role shifts to one of sensitising an individual or group to the patterns that are in place within and around them. These may be patterns of thinking, of behaviour or of interaction. To do this, I may summarise and reflect back what has been said, or observed, offering no judgement upon it, but 'holding up the mirror' to enable the group to consider the pattern and explore whether they recognise it and feel its effects. In this stage the group members are likely to become more aware of any emerging patterns and more open to exploring them.

When existing patterns have been identified and accepted, I frequently ask a group to challenge those patterns. The purpose of this is to identify whether this pattern of thought or behaviour is helping to achieve the group's desired outcomes. Is it effective in moving the individual or group in the direction they wish to go? Is this pattern successful, but only at the expense of something else that might be important to the group or individual concerned? This process is very closely linked to the facilitator working with a group to establish norms: the norms that currently exist and those that they would like to put in place for the future. This stage is one of pattern evaluation and it may require me to 'hold firm' and confront discrepancies in the group – for example, discrepancies between verbal and non-verbal communication, discrepancies between what is said in the formal session and in informal dialogue, or discrepancies between what is agreed in principle and what is actually put into practice!

Moving from present to future orientation

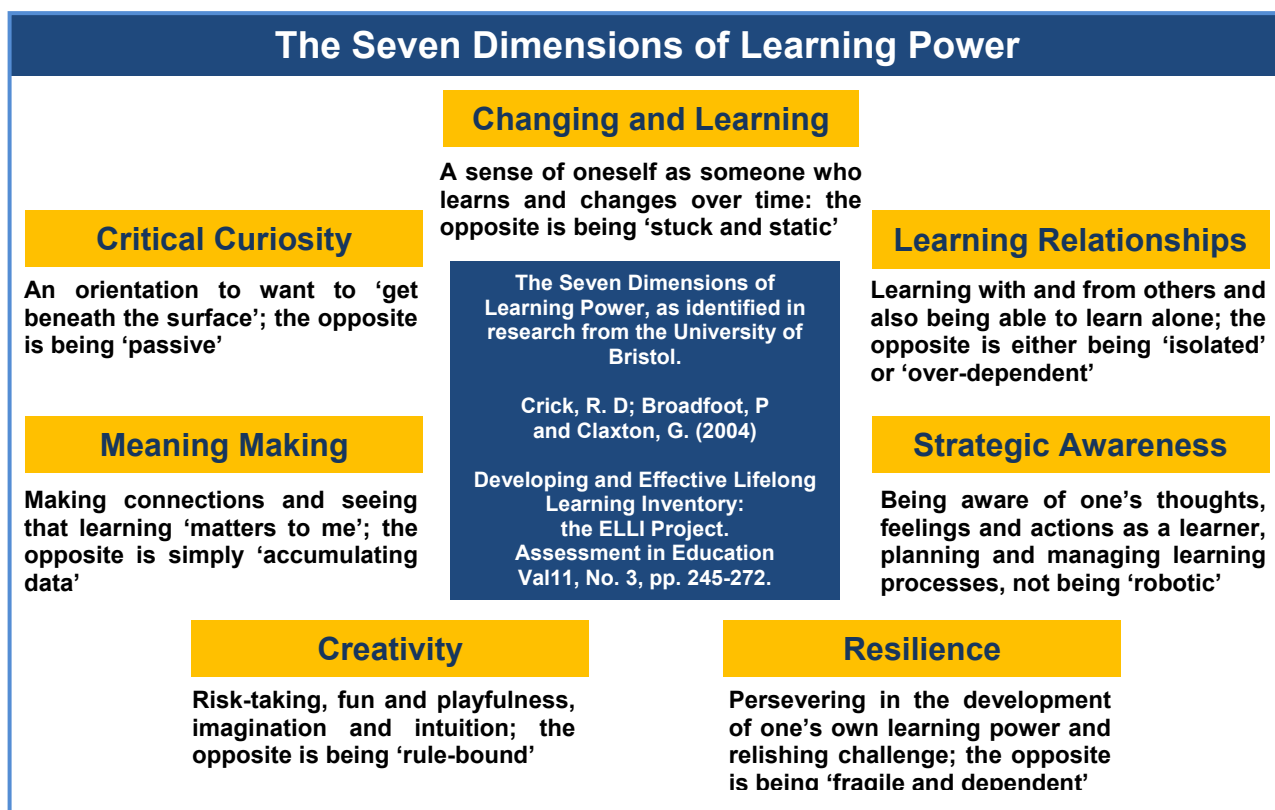
Following pattern evaluation, group members choose which patterns to keep and reinforce and which to break and eliminate. At this point, my aim is to move the group from a focus on the present into planning for the future – the stage that is sometimes referred to as 'movement to action'. This involves the clarification of goals and, by using tools and techniques for action or project planning, the selection and rehearsal of more effective patterns.

Seven dimensions of learning power in facilitation

The process I have just described will be very familiar to experienced facilitators. What might be less familiar is a focus on the ‘patterns of learning’ that are used and demonstrated by the group. An extensive research project at the University of Bristol in the UK, led by Ruth Deakin-Crick (Crick et al 2004) has identified seven ‘dimensions’ of effective learning: the things that are in evidence when we ask the question, “What makes an effective learner?”

These seven dimensions illustrate patterns of thought, feeling and action that combine in learners with well-developed ‘Learning Power’. They are measured through a fully validated profile tool known as ELLI: the Effective Lifelong Learning Inventory. Interestingly, these seven dimensions are also woven into the facilitation process. The seven dimensions, each with specific definitions in relation to learning, are described in Figure 1.

Figure 1: Diagram based upon The Seven Dimension of Learning Power,



as identified in the ELLI research (Crick et al 2004)

How facilitation develops learning power

So, how do facilitators, working with groups towards the achievement of apparently unrelated goals, also enhance the learning capability of the individuals and groups they facilitate? If we look at the seven learning dimensions we begin to see the connection.

Learning Dimension 1: Changing and Learning

Facilitators are often brought in to work with a group that feels ‘stuck’: current patterns are not working and the group members may have lost the belief in their capacity to go on learning. In this situation, the facilitator works to re-build confidence, to create a vision of an achievable future and to demonstrate how the group has succeeded in the past and can do so again. A simple set of questions such as those below

focuses the group on their ability to learn and change and gives them confidence that they do have the resources they need to move on.

“Can you describe to me a time when you did successfully solve a difficult problem?”

“What did you learn from that experience?”

“How could you use that learning now to help you to move forward?”

Several years ago, I worked with a major commercial organisation which was in a process of significant change. A key part of their business, which had always been undertaken in the UK, was being relocated to Africa, where most of their raw materials were produced. This meant huge change in the nature of the business and completely re-thinking future planning. As a facilitator, I was brought in to work with the team on a ‘Breakthrough Thinking’ process, to explore new directions and innovations relating to securing the future of the business. In reality, much of what we worked on was directly linked to the Learning Power ‘Changing and Learning’ dimension: for many long-term employees of a high-profile, old and established business, with strong traditions and valued cultural heritage, the most valuable role that the facilitator could play was in building the belief that:

- a) change was inevitable, achievable and could bring positive results and
- b) as individuals and teams they had the capability and confidence to learn and change, so that they could drive new initiatives forward.

Learning Dimension 2: Critical Curiosity

The facilitator encourages and supports Critical Curiosity by modelling the use of thoughtful and carefully selected questions, by asking group to challenge assumptions and by testing boundaries. Whenever a facilitator uses a conscious ‘challenge’ to what a group is presenting, critical curiosity is being stimulated. The facilitator is asking the learners to dig more deeply...

“Why do we have to do it like this?”

“Are there other techniques or processes we could try?”

“What might happen if we changed this?”

The importance of this dimension in facilitating organisation improvement was highlighted for me in working with a UK car manufacturer and one of their supplier companies. A combined development programme was created for two teams, one from the purchasing team of the car manufacturing business and one from the operational team of the smaller, specialist supply company who provided a range of specific car engine components. The success of the programme in ironing out a number of issues in the supply chain, and in building a more successful long-term relationship between the two businesses, came down to a simple process: the stimulation of Critical Curiosity in team members. Questioning each other about how and why things were done in particular ways, the implications of changes to ordering, time-lines, volumes etc, the manufacturing processes in each business led to sudden insights into why problems arose and new proposals that would benefit each business.

Learning Dimension 3: Meaning Making

Ideally, the facilitator is a perfect 'role-model' in using the Meaning Making dimension to support a group in connecting ideas and concepts, exploring the implications of these for themselves and for their wider organisation, and helping them to identify the relative importance of their issue in relation to other pressures. Questions such as the examples below help to build the capability to make connections, relate ideas to each other and to the individual learner's own experience.

"What is the connection between this and other projects that you are already working on?"

"What is the meaning of this for you?"

"What are the implications of taking this into other teams or other areas of the business?"

Visual facilitation tools such as mind-mapping or other visual thinking methods, flow-charts or 'clustering' exercises support the ability to make links, see the inter-connectedness of themes and ideas and build a bigger picture from a set of snapshots.

Learning Dimension 4: Creativity

Facilitators can use this playful dimension in order to encourage groups to 'let go', asking questions such as,

What would you do if you had no constraints at all?"

"What would happen if.....?"

"What other options or possibilities have you explored?"

Experiential learning activities, simulations and the presentation of challenging, team problem-solving tasks are often used by facilitators to encourage teams to explore their own processes, working patterns and habitual behaviours. One of the advantages of these activities is that they encourage experimentation, allow for the testing of many innovative solutions and build confidence in the learner's ability to generate multiple options as part of the learning process.

Image 1: Members of TNT NV Risk Management and Internal Controls team,



Developing the 'creativity' dimension of their team learning in advance of planning a key business project.

Who would imagine that this playful and creative construction activity was an important part of an extended piece of team facilitation that brought together a multi-national, multi-cultural, cross-functional team at the start of a business critical corporate project?

Working creatively, within a well-designed simulation, allowed the TNT NV Risk Management and Internal Controls team to

learn significant lessons about integrating cultures, working with client demands and managing a complex project. The simulation, designed by Dr. Geoffrey Cox of RSVP Design Ltd and known as 'Shaping the Future', mirrored many of the challenges that the group would face in managing 'business as usual' whilst also delivering a hugely complicated and unfamiliar project. They took advantage of a rehearsal opportunity that supported the on-time, on-budget delivery of the project and, significantly, also built their creative learning capacity as they experimented within the safety of the simulation framework.

Learning Dimension 5: Strategic Awareness

Strategic Awareness is illustrated beautifully in the way that a facilitator distinguishes between the task and content of a meeting or discussion and the process that is being used to achieve that task. The facilitator's ability to structure an effective process – regardless of the specific content – illustrates the power of 'process' to the group and encourages the development of similar personal learning strategies.

Facilitating an international group from the United Nations World Food Programme, I used a visual mapping exercise to explore the team's past experience of dealing with critical incidents, then using this to inform scenario planning. This activity uses the metaphor of an old-fashioned sea voyage, with all the inherent risks, uncertainties and important new discoveries and treasures that such a journey offered. Using a map and cartoon imagery, which represents critical incidents, threats and opportunities, a team can explore past experience and think about the voyage ahead. In the WFP context, this process had a very specific business outcome. However, I was aware that I was also helping them to develop an important learning dimension – Strategic Awareness. Creating the map of the journey they had shared, and the one they anticipated lay ahead, highlighted the importance of taking time to reflect upon their learning, clarify the lessons it offered, and use that learning in future planning.



Image 2: Recognising the value of well-developed Strategic Awareness in learning.

A group from the UN WFP headquarters in Rome work through a facilitated 'Voyage Mapping' process, identifying how to use past learning to prepare for the challenges that lie ahead.

Learning Dimension 6: Resilience

Facilitators work to create a 'safe' and supportive environment in which failure is accepted as part of the learning process and the reasons for failure can be addressed and explored. They will also ask a group to work with issues that are sensitive or uncomfortable, exploring how understanding failure, disappointment or conflict can lead to creative solutions, resolution of differences or solid agreements built upon deeply held values. A specific example of the importance of appropriate levels of Resilience will be well-known to those involved in the facilitation of negotiations. Negotiation requires learning: learning about the needs and goals of both parties, learning about the proposals on offer and learning about new options that might not have been considered earlier. This can generate negative emotions: frustration, confusion and even anger. The key risk is of the process breaking down when people succumb to the temptation to give up or walk away. In the fine balance between holding firm to what you want to achieve and offering enough flexibility in making concessions to enable the negotiation to move forward, fragile and dependent learners, with low levels of resilience, may need additional support from the facilitation process to enable them to persevere with a negotiation, to a successful conclusion.

Learning Dimension 7: Learning Relationships

The facilitator, whose work focuses on shared learning, group process, interpersonal communication and movement towards shared outcomes, is perfectly positioned to support the creation of powerful learning networks that support individual initiatives. The facilitation of Action Learning sets is an excellent example of this. Whilst the Action Learning methodology does deliver task results, anyone who has been involved in an extended Action Learning project will recognise that the methodology also enhances the learner's capacity to learn with and from others. It encourages learners to take advantage of the available and shared expertise, whilst also accepting individual responsibility for independent personal learning within the group context.

Task, group and learning processes

As facilitators, we make a clear differentiation between task processes and group processes. For example, we recognise the difference between the content of a discussion and the process the group uses to reach a decision based upon that content. We learn to recognise not only *what* a group does but *how* they do it. I believe that we should also add into this a third distinction – a recognition of, and familiarity with, the learning process that a group is engaged in. As facilitators, just as we plan and manage appropriate group processes, so we should plan and manage appropriate learning processes.

Developing learning capacity and building bridges

The theme of the IAF Europe Conference in Istanbul in October 2011 is 'Building Bridges'. Learning is the bridge between what we feel able to do now and what we would like to be able to do in the future. Learning is the bridge between current reality and aspiration. Learning is the bridge that we cross as we work through any change process: it is what supports us and keeps us safe as we cross from a secure base to the insecurity of a new destination. If we can help people to learn more effectively, so that they feel more confident in dealing with uncertainty and ambiguity, we are much more likely to facilitate successful transitions – in work, in life and in communities.

References

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About the Author

Ann has thirty years of international experience as an educator, coach, learning designer and facilitator. She is a founding director of RSVP Design Ltd, recognised for her knowledge and expertise in facilitating experiential learning. Ann specialises in developing the skills of internal trainers, coaches and facilitators through her individual coaching, open and client specific workshops, publications and contributions to professional conferences.

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