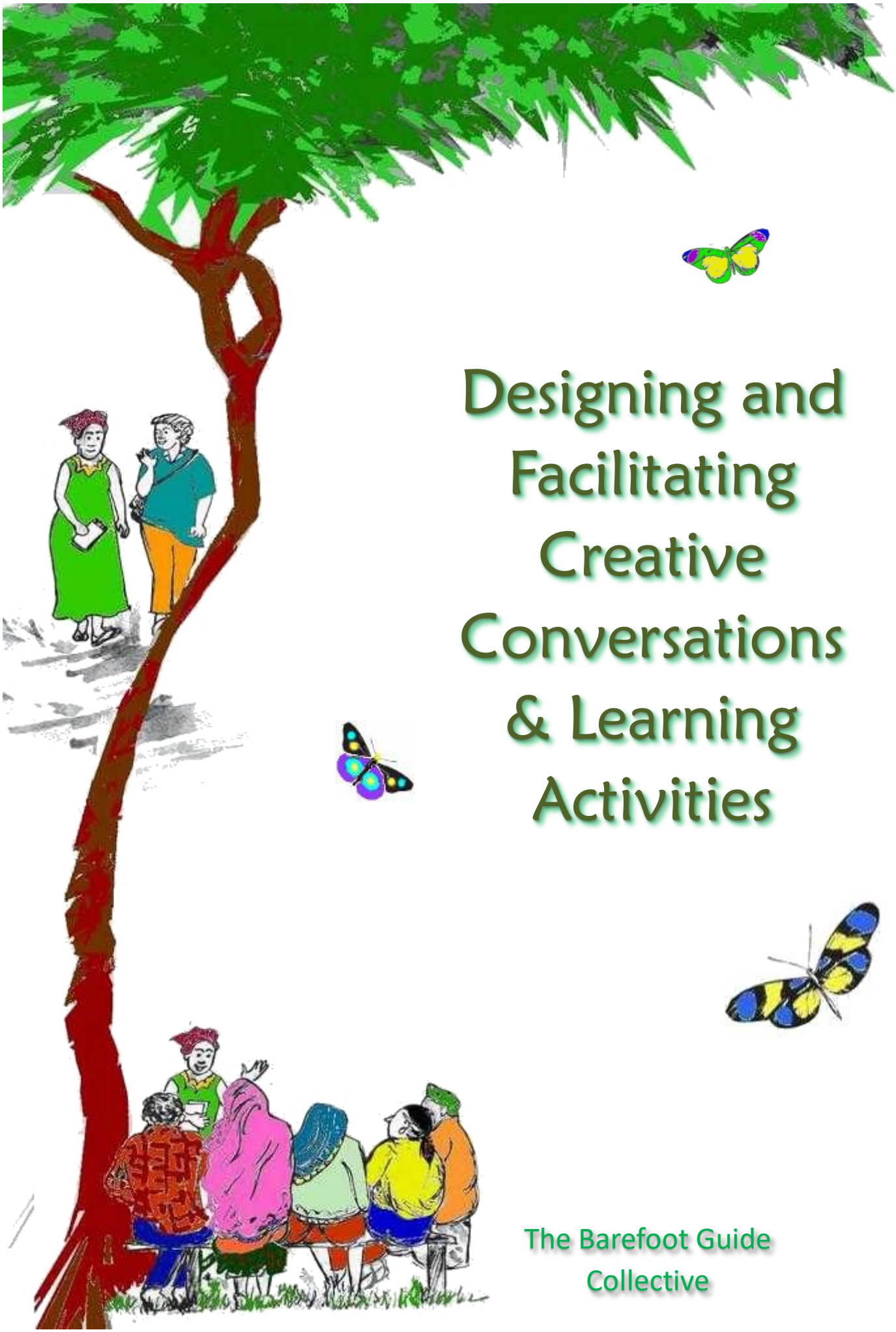
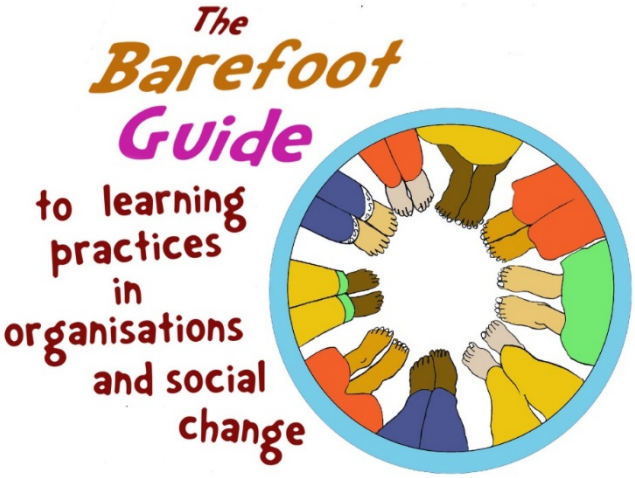


Designing and Facilitating Creative Conversations & Learning Activities

The Barefoot Guide Collective

Designing and Facilitating Creative Conversations & Learning Activities



A Companion Booklet to Barefoot Guide 2:

Learning practices in Organisations and Social Change

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Human conversation is the most ancient and easiest way to cultivate the conditions for change – personal change, community and organizational change, planetary change. If we can sit together and talk about what's important to us, we begin to come alive. We share what we see, what we feel, and we listen to what others see and feel.

- Margaret Wheatley (2002)

'That is what learning is. You suddenly understand something you've understood all your life, but in a new way.'

Doris Lessing

'What is important is to keep learning, to enjoy challenge, and to tolerate ambiguity. In the end there are no certain answers.'

Martina Horner

'Our challenge. How do we create organisational coherence...how do we create structures that move with change, that are flexible and adaptive...that enable rather than constrain? How do we resolve the need for personal freedom and autonomy with organisational needs for prediction and control?'

Margaret Wheatley

'Creative people are uneasy about the status quo; they live on the edge of their competence. They place themselves in situations where they don't know what is going to happen. They accept confusion, uncertainty, and the higher risks of failure, as part of the process.'

David Perkins

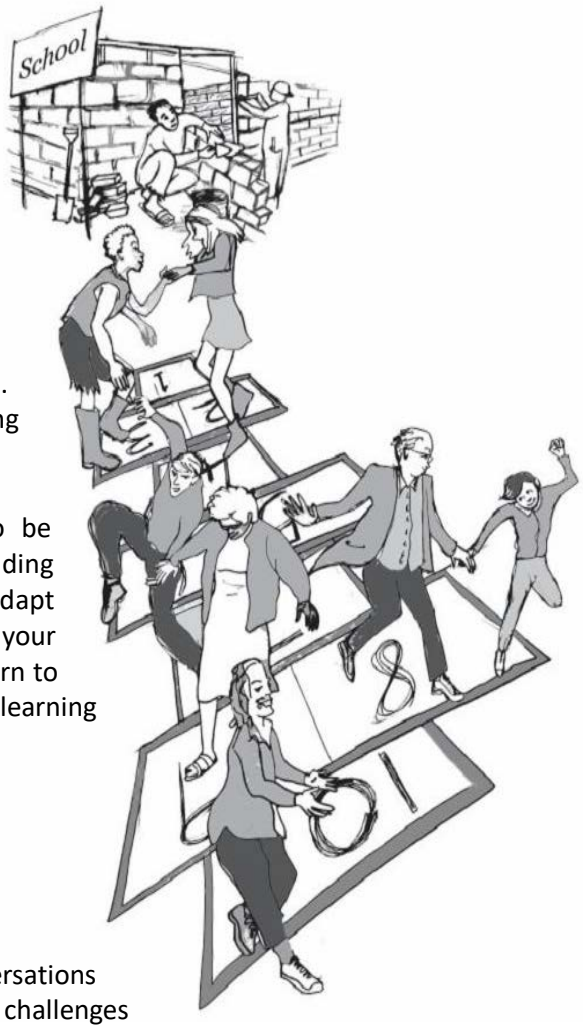
'Every discovery contains an irrational element or a creative intuition'.

Karl Popper

Introduction

Welcome to this Companion Booklet for the Barefoot Guide. If you are responsible in any way for facilitating creative conversations or learning activities in your organisation, whether these are meetings, dialogues, courses or workshops, you are probably reading this to get some ideas of where to start or what to do. This Companion will help you. It's full of ideas and tips, but also some of the thinking that goes on behind the scenes.

A few basic guidelines:



- **Creative conversations or learning are fundamental to organisation.** They are processes, threads running through your organisation, not just unconnected events. How can you connect conversations, learning and working activities to better serve each other?

- **Start small with what you have**. Often making small changes to existing practices is the best way to begin. Strengthen the way you do things before introducing major changes.

- **Don't look for recipes to copy.** Allow yourself to be inspired and stimulated by the ideas of others, including what you find in this Companion, but make sure you adapt them to your situation and needs. Experiment with your own ideas and ask participants for theirs. Above all learn to trust your own instincts to ensure that whatever learning activities you develop suit the people and the situation.

What is in this Booklet?

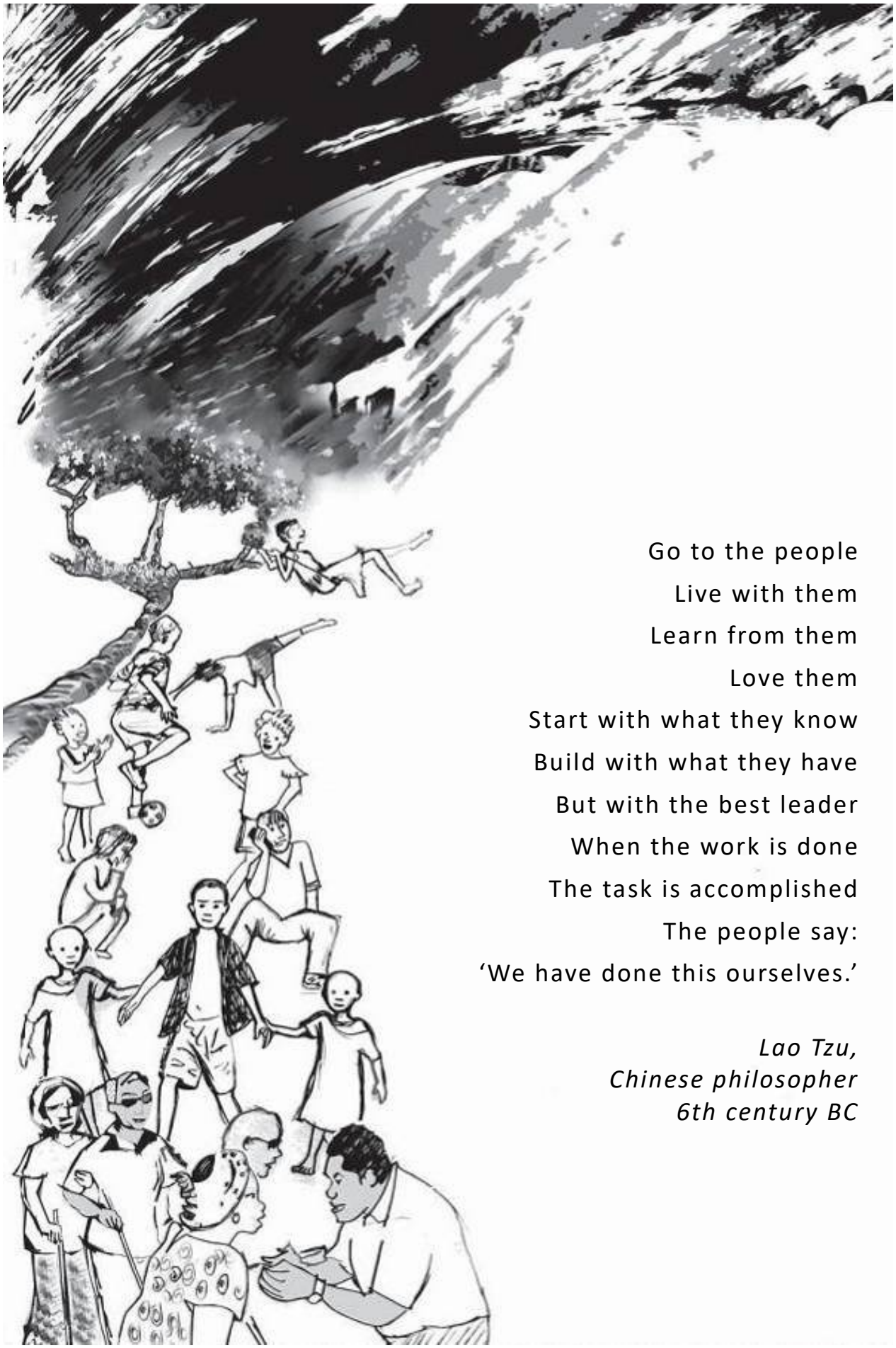
We have three windows to look through:

Firstly, some principles of designing and facilitating conversations or organisational learning activities – these are the deeper challenges (like "working with diversity" or "including the right people") that you need to revisit again and again to make sure that your foundations are strong.

Secondly we look at typical elements of many creative conversations or learning process (like "how to begin a process" or "how to ask good questions").

Thirdly, we describe different kinds of creative conversations or learning processes and events, like "Case studies" or "strategic planning".

Start where you like and see where that leads you… creative conversations or learning processes are explorations to enjoy.



Go to the people
Live with them
Learn from them
Love them
Start with what they know
Build with what they have
But with the best leader
When the work is done
The task is accomplished
The people say:
'We have done this ourselves.'

Lao Tzu,
Chinese philosopher
6th century BC

A. Principles of Design and Facilitation

Four Ways of Talking and Listening

(Adapted from Changing the World by Changing How We Talk and Listen - by Adam Kahane)

Most organisational processes involve conversations of some kind. There are four distinct conversational modes to work with: Downloading, Debating, Reflective Dialogue, and Generative Dialogue. To meet the variety of conversational needs out there we have to develop our capacity to recognize and navigate through all four of these modes.

A. Downloading

In Downloading, we repeat what we already know, focused on one-way information flows or sharing, without generating new insights or challenging whether it is true or not. We download (like from a computer file) or project (like a slide projector) our thoughts and feelings onto the world. By definition, Downloading upholds existing rules, conventions and behavioral norms.

The strength of Downloading is that, when the rules fit the context, it is predictable and efficient and supplies the right answer without hesitation or uncertainty. It is more about people having their say than listening to each other and thus is tends to reinforce the status quo, often leading to stuckness or crisis. When this happens, when people are frustrated by it, it can often pave the way for Debating.

B. Debating

We move from Downloading to Debating when we stop saying what we think we have to say and start to say what we are really thinking, often in reaction to what others have said. In Debating, we say what we think. We speak our minds openly, even at the risk of fragmenting the system ("How are you?" "I am terrible."), of causing discomfort or even conflict. We debate and make judgments, like in a courtroom. We test our ideas against each other, as in an argument.

Moving from Downloading to Debating is a momentous step outward towards an active search for alternative facts, perspectives, and options, for more honesty and towards the embrace of free speech, robust challenge, and open argument. Debating can stimulate change, but it can also create another kind of stuckness or crisis of being trapped in conflicts between differing viewpoints, of "either/or" thinking, of winning or losing the argument. When people tire of this mode and realise that it is not always helpful, they become more open to change, realising they need to listen and appreciate what others are saying and start to practice more Reflective Dialogue.

C. Reflective Dialogue

In Reflective Dialogue, we move outside of ourselves, towards each other. We become curious to see what we can learn from others, to add to what we know, even to replace it. We start seeing through their eyes. We also listen self-reflectively to ourselves and hear ourselves through the ears of others. We inquire into how things came to be as they are and envision how they might be. We listen empathetically to one another. We seek to build new knowledge together. But it requires a determination to move beyond Debating and to find trust and courage within and between ourselves.

The more we engage in Reflective Dialogue, as trust, empathy and even affection develop, the more we lay the conditions for Generative Dialogue.

D. Generative Dialogue

In Generative Dialogue, we are fully present to what is emerging in the whole system. We may speak one after another, but it is as if we are completing each other's thoughts. The normal sense of separation between people seems lessened, from appreciating each other's different perspectives (as in Reflective Dialogue) to being, for a while, a whole collective "I."

In a Generative Dialogue, it is as if meaning emerges not from any one person but from the center of the circle. We are not only of one mind, but we begin to speak from the same deep intentions, from what really matters to us as human beings. The sacred book of the Mayan Q'iche people is called the Popol Vuh. It contains the following text: "We did not put our ideas together. We put our purposes together. And we agreed, and then we decided."

Leading Through Talking and Listening

As leaders, we have ultimately only one instrument: how we talk and listen to each other. Each of the four modes of conversation is legitimate and useful, but if we want to create new social realities, our ability to lead conversations must include Reflective Dialogue and Generative Dialogue.

Why do we find it so difficult to change the world? Because most of us spend most of our time in Downloading: being polite, not listening, saying what we already know, following the rules. We spend some of our time in Debating: paying attention to what is different and arguing about it. But most of us—and certainly most institutions—have limited capacity for Reflective Dialogue and Generative Dialogue, and therefore have limited capacity for effecting deep change.

Downloading, by far the most common, maintains the status quo. It maintains the (artificial) wholeness of the system and re-enacts the patterns of the past. Debating mode, common in organizations with an analytical or intellectual bent, involves vigorous debate and reasoned decision-making. In Debating, we see more of what is there to choose from, but do not create new choices. Reflective Dialogue calls on us to be empathetic—to see the world through the eyes of others—and to be self- reflective—to understand how we influence the world around us. This mode is rare in organizational life, but it is essential for deep change. Unlike Downloading and Debating, Reflective Dialogue allows us to participate in the future that is emerging. As we deepen our relationships Generative Dialogue becomes possible, allowing a group to discover its larger and deeper shared purpose, generatively unlocking creativity in each participant as a collective process.

Generative Dialogue is especially memorable when the participants are from very different backgrounds and have scant hope that they can work together successfully. Generative Dialogue is vital for the success of deep change initiatives. In Generative Dialogue, we are tuned into the potential of the system and what is being born amidst and through us.

The Four Agreements of Courageous Conversations

1. **Stay engaged**:

Staying engaged means "remaining morally, emotionally, intellectually, and socially involved in the dialogue".

2. Experience discomfort:

This norm acknowledges that discomfort is inevitable, especially, in dialogue about race, and that participants make a commitment to bring issues into the open. It is not talking about these issues that create divisiveness. The divisiveness already exists in the society and in our schools. It is through dialogue, even when uncomfortable, the healing and change begin.

3. Speak your truth:

This means being open about thoughts and feelings and not just saying what you think others want to hear.

4. Expect and accept non-closure:

This agreement asks participants to "hang out in uncertainty" and not rush to quick solutions, especially in relation to racial understanding, which requires ongoing dialogue.

Adapted from Glenn E. Singleton & Curtis Linton, Courageous Conversations about Race: A Field Guide for Achieving Equity in Schools. 2006. pp.58-65. Thousand Oaks, CA: Corwin.

Facilitating Dialogues – What is the real work here?

As a facilitator you have many roles, some obvious and visible to the participants and some not. This section discusses some of the less obvious and visible roles you may have to play in bringing people together, especially if there are some tensions and difficulties under the surface.

Supporting a dialogue culture of self-awareness, honesty, forgiveness and learning.

As a facilitator you are responsible for helping the culture of the dialogue process itself to be healthy. The more you can cultivate self-awareness, honesty, forgiveness and learning the more the people begin to practice ways of facing the issues of culture change in the workplace itself.

If you are open and honest with yourself and about yourself, and if you see your job as helping people to be self-aware and honest with themselves, especially with the role that they may have played in helping or hindering a situation, then there is a better chance of success. Your self-honesty and vulnerability will enable theirs. Don't be too afraid of being vulnerable – it can really empower others.

Coupled with self-awareness and honesty should be behaviours that do not ridicule or punish "failure" or mistakes but rewards openness about mistakes with forgiveness and encouragement to learn from these. Seen the other way, Intolerance of failure in a culture focused on delivering results at all costs cultivates subtle, unintended dishonesty about what is not really working and the hiding of valuable experience, leading to real failure. In the dialogue process, where opportunity arises, help people to remember this critical piece of wisdom about healthy and unhealthy culture – they already know it but easily forget it when the pressure is on.

Appreciate and celebrate what is working well and honour those responsible.

We all know how much we focus on problems, on fixing what is wrong and criticising those responsible, rather than appreciating what is working well and strengthening that. The big problem is that If I do not give deserved appreciative feedback to you for your good work or contributions, then you are likely to either doubt yourself (and do something else that may not work!) or resent me for not caring. Either way the result is now a problem. Make sure in the dialogue process that people express and honour and do not lose sight of what is working well. And ask them what they can do to strengthen these things. This culture in the dialogue process can help cultivate it in the workplace.

Whenever people share difficult things, thank them for their openness and courage. This will en-courage others.

Working with emotions, real experiences and empathy.

In some ways culture represents the emotional life of the organisation. We experience the organisation most directly and immediately through our emotions and often respond out of them too, in ways particular to our organisational culture. Do not hesitate to ask people to express how they feel because this helps to point us towards the things that matter most to them, connecting them to what caused those feelings. From there ask what the real experiences were (their stories) they had that triggered these feelings. If people are really listening to each other (more so if you have helped them to do so) then you trigger **empathy**.

Empathy is the gold of healthy culture. This is the emotion and the quality that best defines us as human and brings out the best in us, because with empathy we help people to deeply understand each other in ways that calculated analysis cannot. *If you can evoke empathy between people you are laying the tracks of real change between them. This is why people need to hear each other's stories.*

Unlocking the will for change.

You may help people to see the need for change and you may have supported them to have a good degree of empathy for each other, but that is not always enough. Often there are blockages to their will to change that need to be surfaced and shared. In sharing these blockages openly, giving them air, they often lose their power over us. Remember that we all have the will for change – it is a natural capacity – but that willingness may be blocked, and these blockages may be hard-baked.

These lingering blockages take many forms but the most common are:

- **Fear**. Fear of losing face, fear of losing that promotion or raise, of being punished or even of being hurt, fear of the consequences of not delivering or of losing or sharing power…
- **Doubt or self-doubt**. Doubt that others can change or lead or do the work or learn the skills, or self-doubt (lack of self-confidence) that I am good enough.
- **Hatred, self-hatred or resentment**. Often caused by hurtful experience, we struggle to forgive each other or even ourselves for what was done.

Sometimes the most effective way to unblock the will is to get people to ask themselves if they still harbour these, even after hearing each other's stories. Some quiet space for self-reflection may be required. Then they can be asked to express them to the group, one by one, going around in the circle, slowly and respectfully, without interruption. This is almost a ritual process. In doing so there is a better chance that by bringing them to light, into the open, they can be let go of. You will know you have succeeded if afterwards there is a noticeable release of energy in the room, if people are looking each other in the eye, chatting and laughing, as if in relief. If not, you will have to allow more space for storytelling, for surfacing what is struggling to be said.

Bring some joy and lightness of being.

Dialogue can be serious work and things can get heavy when distress is expressed. Try to bring balance in between heavy sessions with a lightness, with smiles and warmth, perhaps using opportunities to appreciate something or someone. Ask for small break and an ice-breaker when things get overly heavy. But don't make light of serious things in case people feel you are trivialising their distress. Tea times are also important for people to reconnect with "normality" so don't cut these short.

Dealing with accusations and conflict

If conflict or accusations break out make sure that the situation does not become an overly heated shouting match, where people are losing control of themselves. If that does happen then call for a break immediately to allow tempers to cool. In the break go and speak to each party separately to find out more and if it feels right, bring them together to broker a peace. If their issue is not about the culture (e.g. it may be only an interpersonal thing) then ask them if it can be resolved in another process. If it does reflect something important in the culture then you may want to use this as a min-case-study, but only if the parties are able to cool down and talk it through with the others – ask for their permission. When you return explain what has happened and proceed.

It will be most important for you to remain calm and not take sides in any way.

When people make accusations, for example "I am tired of XXX shouting at me!" then it is important to ask, "Please describe exactly what happened… how did you feel?" and ask if anyone else was witness to the event(s) and what they saw. Then make sure that the 'accused' can respond with their version and how they felt. Once the story is out then ask the others in the group for their perspective on whether this is a reflection of more than the individual relationship, or if it is a symptom of a cultural problem. Ultimately what you are looking for is to uncover the source of such conflicts, reducing blame and growing understanding. If it feels right, ask if any of the parties can own any responsibility for their part and if any apology if due.

But something else may happen and you may find yourself uncertain of what to do. Don't be afraid to say "Does anyone have some helpful thoughts about what we should do now?" Asking the group for guidance can be a good facilitation approach as it cultivates joint responsibility and maturity. Someone in the group may bring good advice and a way forward that the others like.

Allow people to express themselves, but if several people express negative thoughts about the process, ask them again for helpful ideas for the way forward.

See "Working with interpersonal conflict – some basics tips"

Different Spheres of Change: Being – Relating - Doing

Some changes will happen at an individual, about people **being** different and some at a relational level, about **relating** to each other differently, e.g. being kinder, listening more, being curious about each other's experience and feelings, while they are doing what they normally do. Some changes will be about **doing** things together differently and there may be specific actions to take (e.g. taking pot-luck lunch together once a week, or including a small exercise at the end of a meeting where people can reflect honestly about how they are feeling and what did or did not work in the meeting).

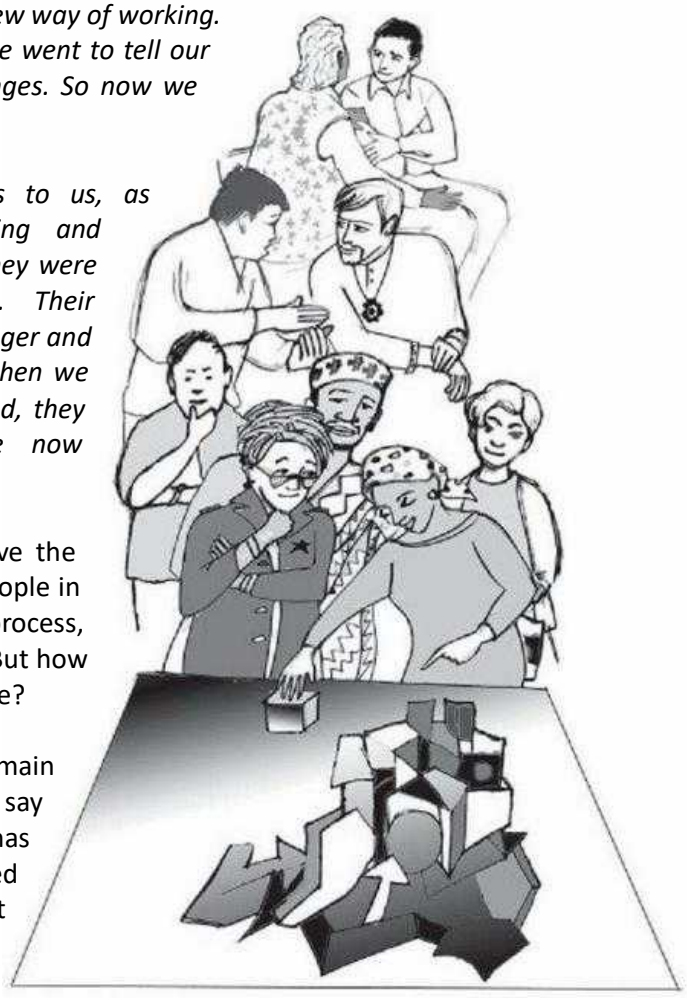
More often than not change must happen at all three levels if it is to be sustained.

Include the right people

It was a great workshop. We came up with a new way of working. We were all excited. But the next day when we went to tell our manager he said we couldn't afford the changes. So now we are back to square one.'

***

After a long workshop it became obvious to us, as programme managers, that the monitoring and evaluation team would be more effective if they were split up and based in country offices. Their relationships with the field staff would be stronger and the information richer. After the workshop, when we informed the M&E team what we had realised, they totally rejected our suggestion and are now complaining to the union.



Whether you like it or not, whether you have the time or not, it is crucial to involve the right people in a creative conversations or learning event or process, or you too could 'end up back at square one'. But how do you know who should or should not be there?

The *purpose* of the activity should be your main guide. What do your values and principles say about participation and involvement? Who has important information and who will be affected by the issues? What will happen if you do not invite certain people? Who can offer useful or different ideas?

"Nothing about us without us!"

This is a slogan and a principle from disability movements tired of other people coming up with solutions to their problems without fully involving them. Those affected by any changes need to be involved in the process – both because it is morally right and also because it makes common sense to seek guidance, ideas and leadership from those most affected.

"Whoever comes is the right people"

This principle from Open Space Technology is put into practice through an open brainstorm. It aims to enable groups to freely discuss questions and ideas that really matter to them, and from which they may kick-start new projects. Often, the aim is to find people who will champion an idea and bring their enthusiasm and commitment. You don't want to force people to come who are not interested, who would rather be somewhere else. They may drag the energy down and pour cold water on the idea.

Get the whole system in the room

This is a principle we hear more and more these days. If we want holistic, integrated and sustainable change we need to get everyone in the room, everyone who is involved or affected in any important way. This builds on 'nothing about us without us' to include a wider range of contributors.

Build confidence before engagement

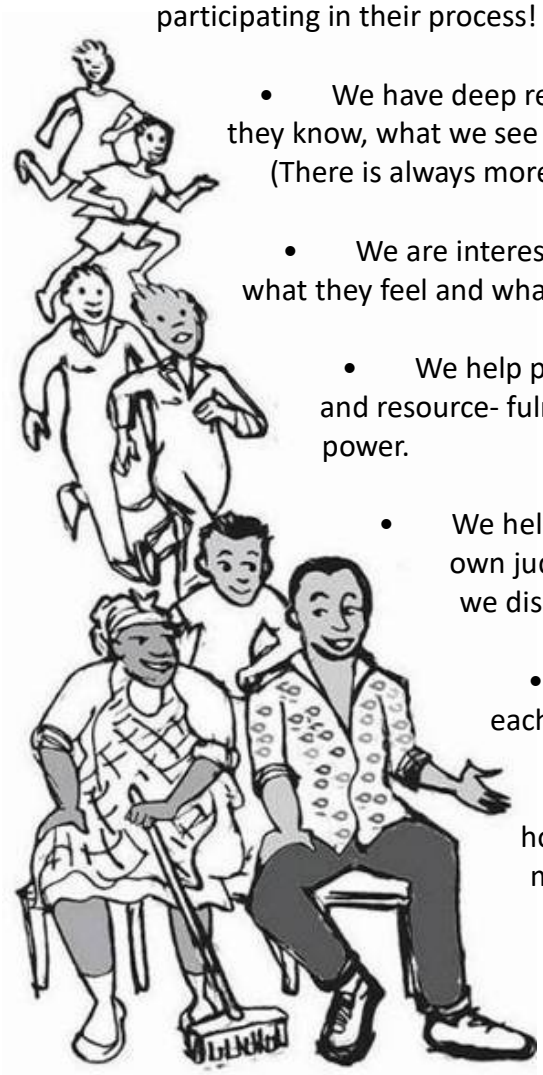
Sometimes people who are not confident of their own power need some space to meet together to discover what they think, feel and want for themselves. This enables them to prepare before they meet with confident people or groups, so that they can engage on a more equal footing.

Participation doesn't necessarily mean having everyone in the same room together at the same time. Often people need a safe place to express their ideas and feelings. In hierarchical organisations, it may be better initially to speak to people individually or in peer groups. Once you get an idea of they are thinking you can design the next stage of the process in a way that will enable big issues to be raised without causing loss of face or resentment. Creative conversations or learning processes can help to break down hierarchies but this takes time and careful thought.

Some Principles of Facilitative Leadership

A great question to ask in organisational and community development processes is:
"Who is participating in whose process?"

- As leaders and facilitators, we understand that people are already developing along their own journeys. Our role is to help them see their journey and the countryside more clearly so that they can make their own choices. We are participating in their process!



- We have deep respect and curiosity for who people are, what they know, what we see of them and even what we do not yet see. (There is always more than meets the eye.)

- We are interested in and listen deeply to what people think, what they feel and what they want.

- We help people to surface their own hidden knowledge and resource- fulness, and to appreciate and celebrate their own power.

- We help people ask their own questions, form their own judgements and make their own choices, even if we disagree.

- We help people learn from their own and each other's experiences.

- More importantly, we help them to learn how to learn effectively so that they can become more independent thinkers.

- We work for the good of the whole community or organisation, not the interests of the few.

Explore 'The whole elephant'

What's an Elephant?

Once upon a time, there lived six blind men in a village. One day the villagers told them, "Hey, there is an elephant in the village today." They had no idea what an elephant was. They decided, "Even though we would not be able to see it, let us go and feel it anyway." All of them went to where the elephant was. Every one of them touched the elephant.
"Hey, the elephant is a pillar," said the first man, who touched a leg.
"Oh, no! it is like a rope," said the second man who touched the tail.
"Oh, no! it is like a thick branch of a tree," said the third man who touched the trunk of the elephant.
"It is like a big hand fan" said the fourth man who touched the ear of the elephant.
"It is like a huge wall," said the fifth man who touched the belly of the elephant.
"You're all wrong," said the last man, "It's large and hot, smelly stuff comes out of it.'

What's a client?

We were neatly divided into three different programme groups, each with our own funding sources and reporting requirements and our own team dynamics. So we focused on our own programmes, ignoring each other's work. But we often had the same clients. Sometimes we would meet our colleagues at the client organisations, not really knowing what each other was doing there.

One day, our manager announced that we would have meetings based on client organisations, instead of programme meetings. You could almost hear the collective groan.

At the first meeting, focused on one shared client, each person had to explain the work they had been carrying out with that client. The first person shared their programme objectives and main activities. But when they began explaining the difficulties they were experiencing, a hush came over the room.

As person after person spoke, a much richer picture of the client organisation started to emerge. The stories built on each other and fresh insights began to bounce around the room. It was marvellous to see everyone doing their best to deepen their understanding of this client organisation – and also to hear laughter and notice knowing smiles.

These meetings became regular, always resulting in new insights only made possible by the different inputs. Indeed, it also enabled new kinds of learning conversations throughout the office."

When working with systems and complex situations, if we only deal with problems or specific parts, we may miss the root causes of the problem or we may fix one part, only to find this has a negative effect on another part. We may spend time trying to address issues that could more easily be addressed elsewhere.

Mapping systems and people and exploring relationships between them can be very helpful in making sure you are not missing information and input. Often it is the relationships that need work, rather than the separate parts of the system.

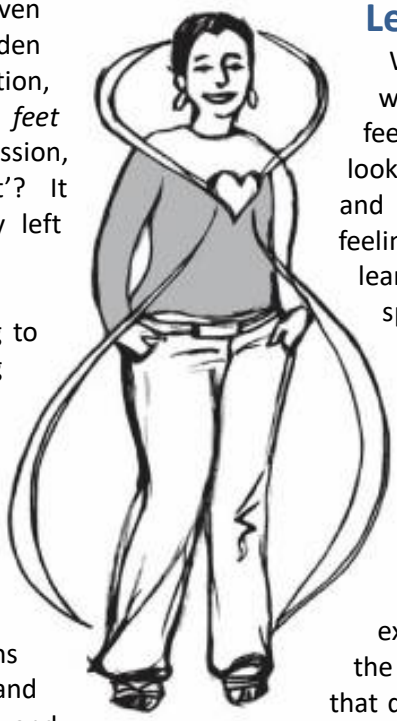
Work with the whole person - head, heart and feet

We can't work with half a person! If we want to work holistically, if we want to engage with the whole person, the whole team or the whole organisation then we have to think about what we are neglecting, where we need to pay more attention.

So often conversations or learning are taken to be only about facts and figures, thinking, ideas and theories, opinions and thoughts – you know, *head level* stuff. These things *are* critical to being clear, scientific, intelligent and strategic.

But what we think is not the only thing that makes us human. Imagine if we had no emotions? In a way we would be little more than walking computers. Our emotional life, our *heart level*, is a key part of who we are – we experience and respond to the world through our emotions, as much as we do through our thoughts. If you want to really discover what is important to someone, whether experiences or thoughts, one way to do this is to find out what they feel, to follow their emotions. Emotions are strong clues to discovering what matters.

But at times you need to dig even deeper than emotions to a hidden level where our true motivation, will, or energy lies. This is the *feet level*. (Have you heard the expression, 'They voted with their feet'? It means: they walked out, they left because they wanted to!)



Sometimes when we are trying to understand why something happened, in order to learn from it, we may be puzzled because things just don't make sense at a head or a heart level. For example, the community leader said that she and the others supported the project, for all the reasons you had discussed with them, and expressed happiness and appreciation for your interest. But when the time came to do the work, no-one arrived; no-one really had the energy or will. It had made logical sense to them to be involved (your plan was good) and everyone was friendly, but actually it was not that important to them; there were other priorities. So what was their motivation? Perhaps it was to be agreeable, not to offend you, so they happily went along (their heart level, emotional response), maybe not consciously realising themselves that they were not so interested. This disinterest was at their feet level, their 'will' response.

What you have
Is a blundering mind.
What you are
Is a learning heart.
Sri Chinmoy

Head Level Conversing and Learning

This involves collecting good information and thinking logically about what happened in order to develop knowledge, theories and ideas.

Heart Level Conversing and Learning

When learning from an experience, we pay attention to the emotions or feelings that were part of the story, looking for how these guided thinking and doing. This also applies to the feelings of the person listening and learning. Do both people feel safe to speak honestly, to share what really happened, without fear of being punished?

Feet Level Conversing and Learning

Often, we cannot really understand and learn from an experience until we uncover the will, the different motivations and energies that drove the situation. What do or did people really want?

LISTENING AT 3 LEVELS

LISTENING TO THE HEAD

This is the thinking level, made up of perceptions, thoughts, facts, concepts, arguments, ideas and assumptions.

Listening non-judgementally means being open-minded and genuinely interested in where the other person is coming from, how they think and what assumptions they make.

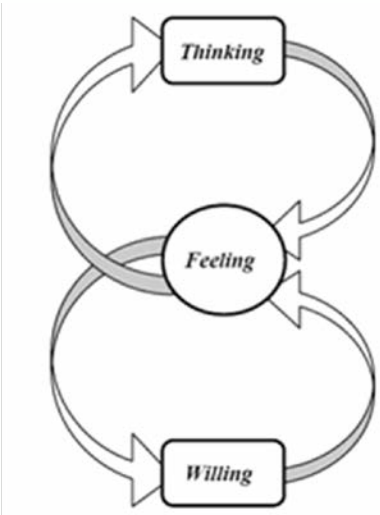
LISTENING TO THE HEART

This is the feeling level, made up of emotions, moods and non-verbal experiences. Listening for feelings, paying attention to tone of voice, facial expressions, eyes and gestures.

Empathetic listening means putting yourself in the other person's shoes. Listening to the silences can reveal feelings of dis- agreement or inadequacy, boredom or anger.

LISTENING TO THE FEET

This is the will level, where you listen for what people really want. Often, speakers themselves are only dimly aware of their own intentions and desires. It's surprising how few people are fully aware what motivates them and what they actually want in a situation. Skillful listening uncovers what lies 'behind' their thoughts and 'below' their feelings. Body language can reveal the will – a strong body presence may demonstrate a strong will, while a withdrawn body may reveal a weak will.



ESSENTIAL CHALLENGES OF LISTENING AT 3 LEVELS

People all have their own ways of seeing the world and thinking about things. Be careful not to assume they see things the way you do.

Listening to someone's true feelings gives you important clues about what really matters to them.

The will level is where resistance to change usually resides. Helping people to listen to and transform their own will is one of the deepest challenges of change.

Appreciate and encourage diversity

In the context of a conversational or learning process, diversity means the varied types of cultural experience, acquired skills, natural talents and physical and mental ability that people bring into the room. If we do not consider this and unconsciously prevent people from participating fully then we are limiting how much creative conversation or learning can take place.

In a multi-cultural organisation, it is common for meetings to be run in a "modern" way, with a pre-planned agenda and a debating style that allows those with strong opinions to dominate and enables quick movement to action. But other cultures often value different ways of meeting that give more attention to relationship-building, dialogue and inclusion. It is important to find ways of meeting that suit both the purpose and the participants.

You can find out as much as possible about the people who will come to your conversational or learning event. And you can create the conditions that will enable them to participate.

Here are a few simple suggestions:

Before the event:

- Ask if people need anything in order for them to fully participate or if they have any particular requirements for food or amenities.
- Ask people what previous experience they have had and what skills they can bring.
- Check that the event will not be held on an important religious or cultural festival that might prevent some people from attending.
- Choose a venue that is as accessible as possible.

During the event:

- Don't make assumptions about what people can or can't do – ask them.
- Have alternatives for people who might find some activities difficult or inappropriate – for example modelling clay instead of drawing materials for someone who is visually impaired.
- Ask people individually if they have anything to contribute – especially those who are quiet.
- Listen to people's opinions respectfully. Try to understand why they might hold them.
- Try to create an atmosphere where everyone is listened to and people's views are acknowledged, to enable people to overcome any barriers they are facing.

After the event:

- Get feedback afterwards so you can learn from the experience; you may inadvertently have excluded people.

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Help people to find common ground

There is huge diversity in the world and we must appreciate and work with it. But there is also huge commonality. We may be different and want different things, but we are human, we all need to feed our children, to live in peace, to be free of oppression, to work in solidarity.

There is so much to disagree about, and it is important to disagree, but it is just as important to find agreement, to look for common ground. If we do not have agreement, we often cannot move ahead together.

When we are facilitating a discussion it can easily become an argument. Our diversity becomes a source of conflict, which can be healthy, but it can also become stuck, with people trying to win the debate.

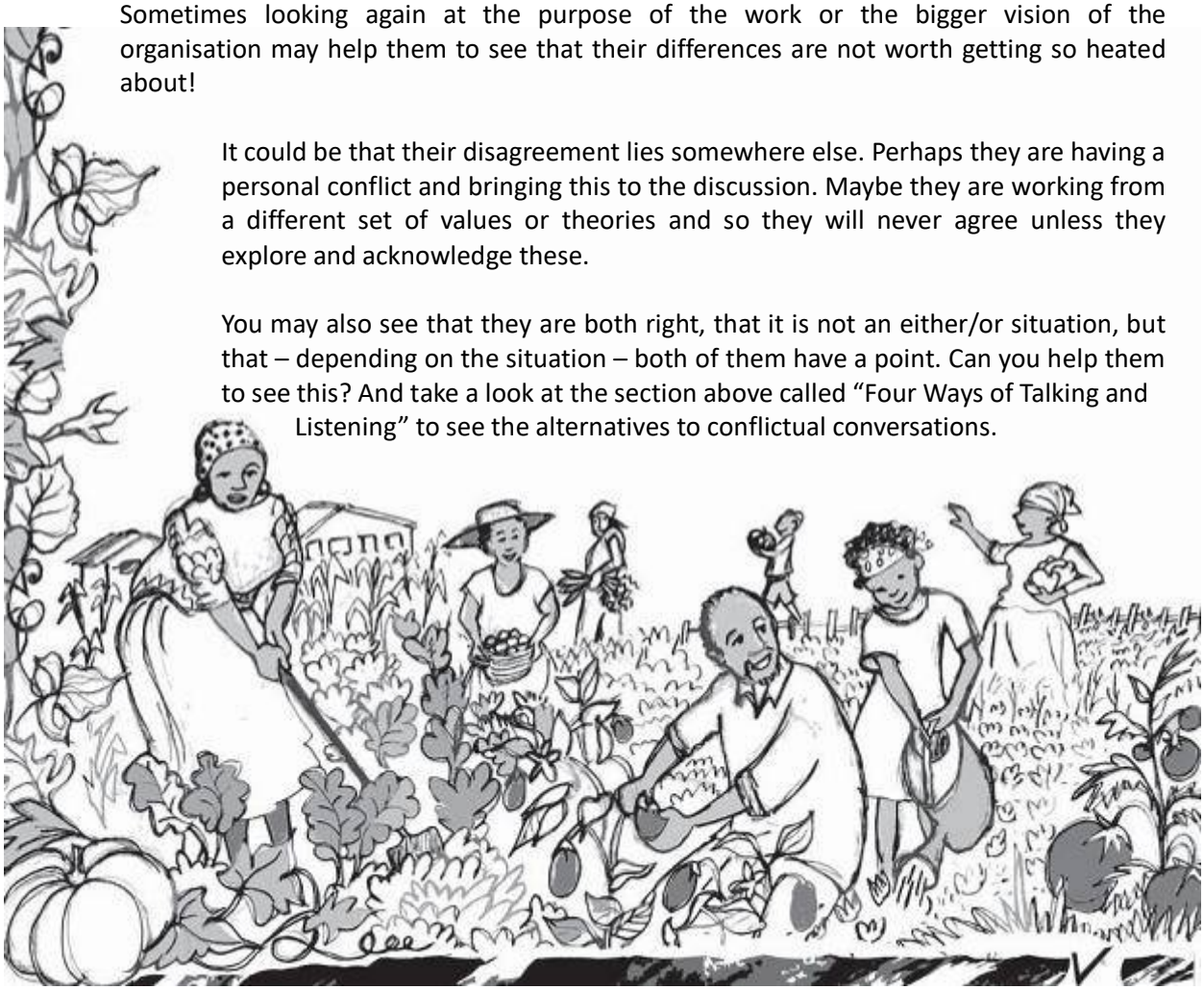
One way to open things up is to ask people to pause and ask themselves where they do agree, and to share this. They may not easily see it, so you may have to suggest where there is common ground.

Sometimes people love to disagree – they like the energy of arguing – but often their differences don't matter that much. Your task might be to bring them back to the purpose of the discussion, to ask them how important their disagreements are for the actual work that needs to be done.

Sometimes looking again at the purpose of the work or the bigger vision of the organisation may help them to see that their differences are not worth getting so heated about!

It could be that their disagreement lies somewhere else. Perhaps they are having a personal conflict and bringing this to the discussion. Maybe they are working from a different set of values or theories and so they will never agree unless they explore and acknowledge these.

You may also see that they are both right, that it is not an either/or situation, but that – depending on the situation – both of them have a point. Can you help them to see this? And take a look at the section above called "Four Ways of Talking and Listening" to see the alternatives to conflictual conversations.



Work with left and right brains

Our brains are divided into two halves or hemispheres. The left half deals mostly with logical thinking processes while the right half deals more with imaginative and emotional processes. Using both sides of the brain well enables us to think and act creatively.

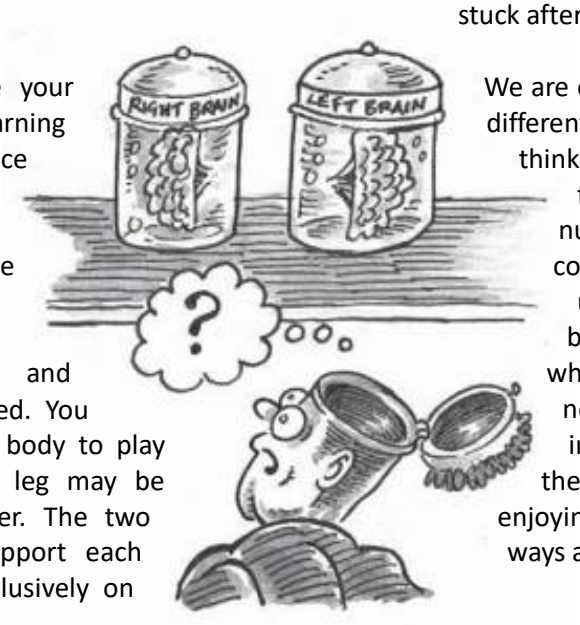
Left Brain Functions	**Right Brain Functions**
uses logic	uses feeling
detail oriented	"big picture" oriented
facts rule	imagination rules
words and language	symbols and images
present and past	present and future
math and science	philosophy & religion
can comprehend	can "get it" (i.e. meaning)
knowing	believing
acknowledges	appreciates
order/pattern perception	spatial perception
knows object name	knows object function
reality based	vision or fantasy based
forms strategies	presents possibilities
practical	impetuous
safe	risk taking

Most organisations encourage their people to be left-brained, ignoring their right-brain capacities and thinking in their processes and activities. Many of their conversations or learning processes follow the same pattern.

Think of a meeting or workshop you have recently been to in your organisation, and look at the table. What percentage of what you did is left brain and what percentage right brain-oriented?

The way you organise your conversational or learning activities will influence how people address an issue or learn from their experiences. If the activities are too left- or too right-brained, important insights and learnings may be missed. You wouldn't use half your body to play football, although one leg may be stronger than the other. The two parts of the brain support each other and focusing exclusively on one is like playing football with one leg. (For more on this see 'The Master and his Emissary': a think piece on the *Barefoot Guide* website.)

If you include creative activities in your process this can bring new ideas and dimensions to the engagement and learning. For example, asking people to see a situation as a picture or metaphor can produce an 'Aha!' moment that enables people to move forward from being stuck after hours of discussion.



We are often resistant to thinking in different ways and automatically think with our left brain. As facilitator we will need to nudge people out of their comfort zone by introducing unfamiliar activities. Don't be put off if everyone groans when you suggest something new. Once they are fully involved, they may find – to their surprise – that they are enjoying it and learning in new ways as well!

Keep an eye on the "real work"

Sometimes as facilitators we can get so involved in the details of the activities that we forget about some of the deeper work that we are responsible for.

Key Roles of Facilitators:

Inspiring people to learn

Are people inspired to be conversing and learning? Do they believe that it is worth investing time and energy in this activity? Is it meaningful for them? Is there a connection between the groups' purpose or vision and what the individuals want?

Energising people to converse and learn

It might be that people are inspired to talk and learn together – they can see the greater purpose but something happening in the group is undermining their will. Perhaps the space is not safe. It might be that they are afraid to be honest. Or they feel stupid and don't want to expose themselves. They may feel discriminated against by others. They might be exhausted. What is de-energising them to fully and willingly participate in the learning process? How can you free the space from these?

Making sure the process is well-focused

Is the process too loose or too tight for what is needed? Are the questions clear? Are the activities suited to the task at hand and tuned into the things that matter to the people trying to participate? Are people's priorities respected.

Grounding the process in experience

Do the activities really draw on people's experience, appreciating and using them as valuable and worthwhile sources of learning? Are "mistakes" seen as an opportunity to learn? Will people be punished for telling the truth that comes from telling their stories?

Challenging new ways of conversing and learning

Is the activity challenging enough to help people to break out of their comfort zones, to think and speak out of the box? Are the difficult questions being asked or avoided? Are they being asked in a positive or a negative way?

Supporting conversations and learning

Is there good human warmth? Are people feeling supported enough that they are open to being challenged?

B. Key elements of learning processes

Beginning a process

a) Warming up the room

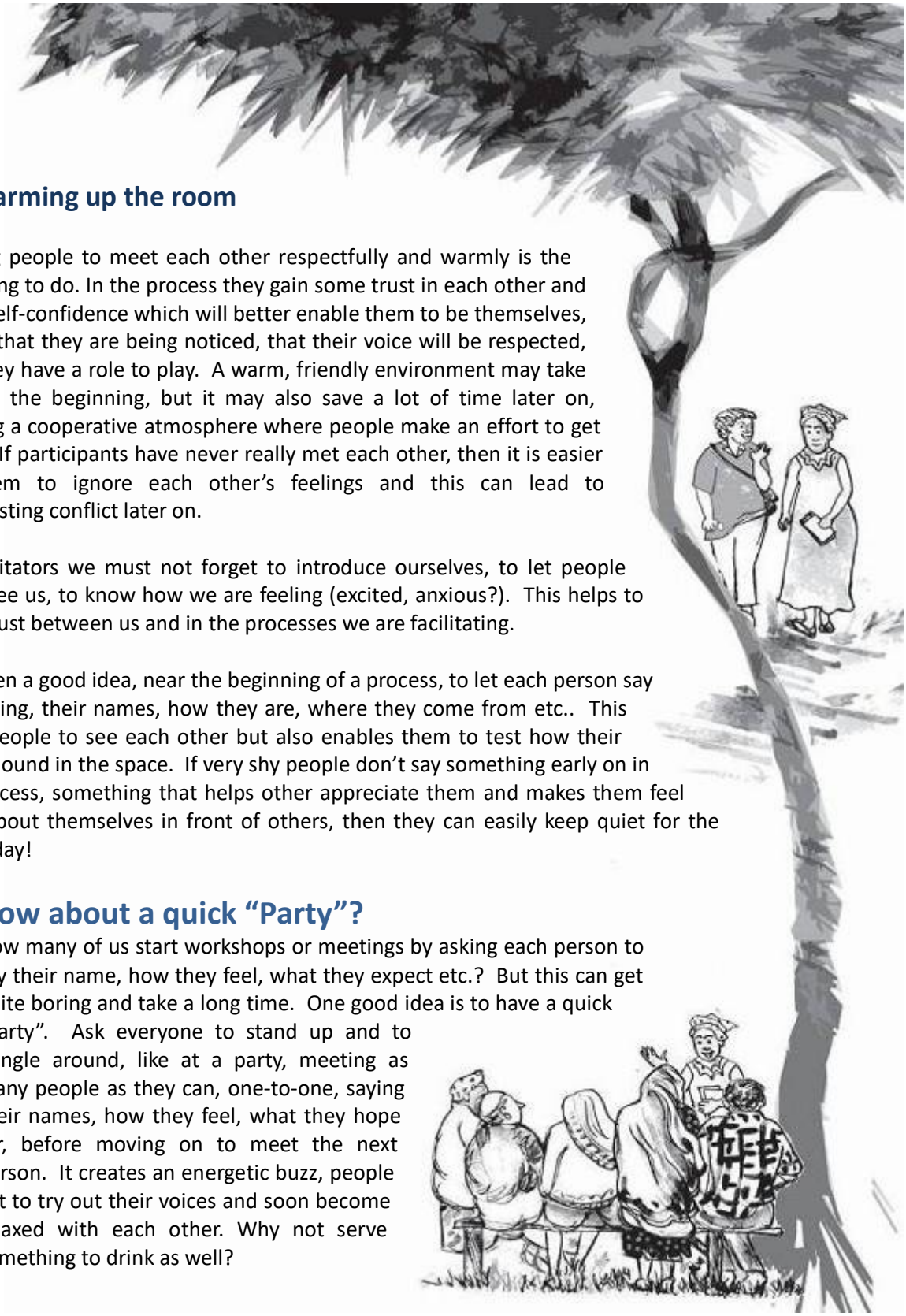
Helping people to meet each other respectfully and warmly is the first thing to do. In the process they gain some trust in each other and some self-confidence which will better enable them to be themselves, to feel that they are being noticed, that their voice will be respected, that they have a role to play. A warm, friendly environment may take time at the beginning, but it may also save a lot of time later on, building a cooperative atmosphere where people make an effort to get along. If participants have never really met each other, then it is easier for them to ignore each other's feelings and this can lead to timewasting conflict later on.

As facilitators we must not forget to introduce ourselves, to let people really see us, to know how we are feeling (excited, anxious?). This helps to build trust between us and in the processes we are facilitating.

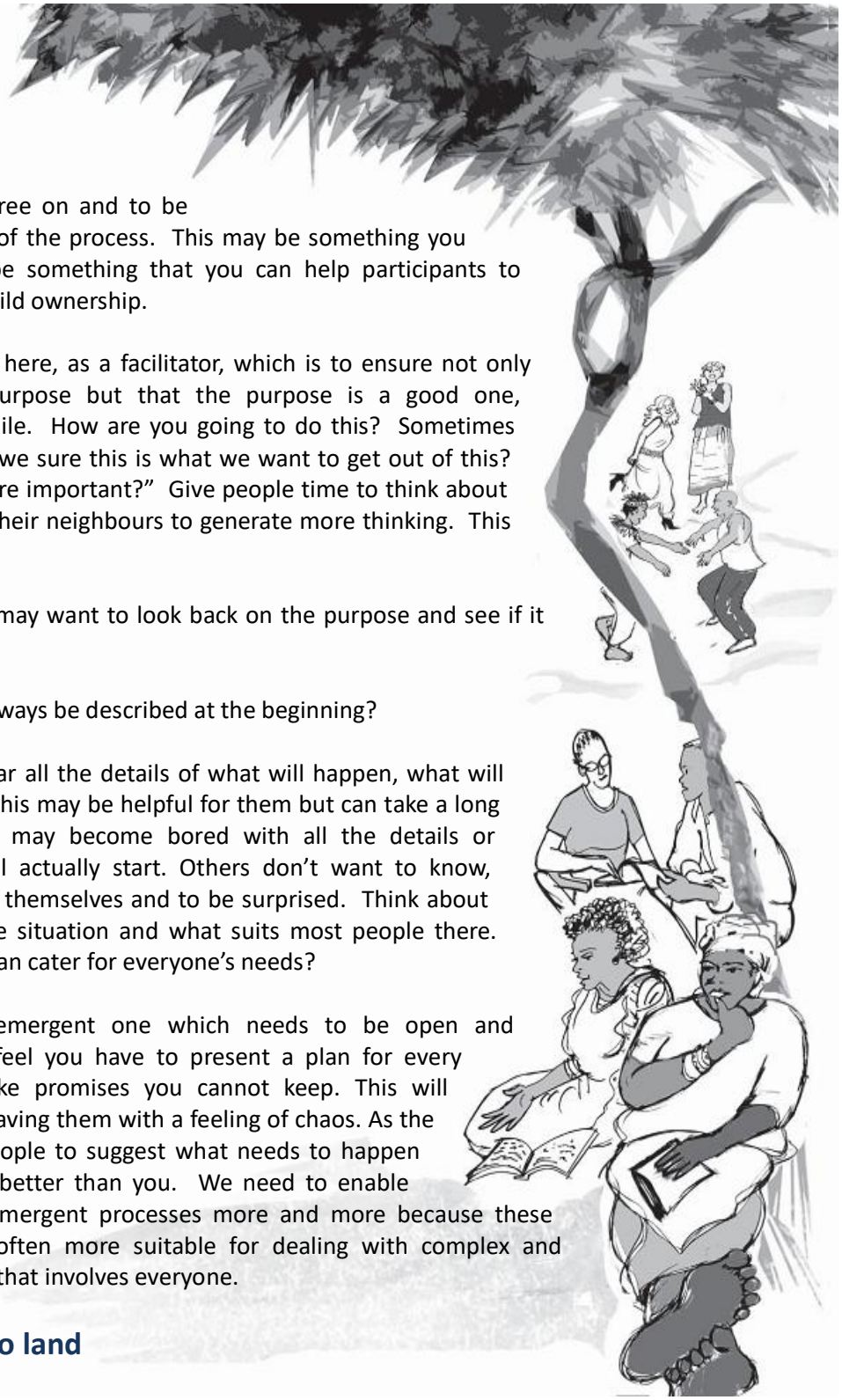
It is often a good idea, near the beginning of a process, to let each person say something, their names, how they are, where they come from etc.. This helps people to see each other but also enables them to test how their voices sound in the space. If very shy people don't say something early on in the process, something that helps other appreciate them and makes them feel good about themselves in front of others, then they can easily keep quiet for the whole day!

How about a quick "Party"?

How many of us start workshops or meetings by asking each person to say their name, how they feel, what they expect etc.? But this can get quite boring and take a long time. One good idea is to have a quick "Party". Ask everyone to stand up and to mingle around, like at a party, meeting as many people as they can, one-to-one, saying their names, how they feel, what they hope for, before moving on to meet the next person. It creates an energetic buzz, people get to try out their voices and soon become relaxed with each other. Why not serve something to drink as well?



b) Establishing good and clear purpose – why are we really here?



Most people want to agree on and to be clear about the purpose of the process. This may be something you bring, but it also may be something that you can help participants to develop themselves to build ownership.

But there is a bigger job here, as a facilitator, which is to ensure not only that there is a clear purpose but that the purpose is a good one, meaningful and worthwhile. How are you going to do this? Sometimes you may simply ask "Are we sure this is what we want to get out of this? Is there anything else more important?" Give people time to think about it, possibly even chat to their neighbours to generate more thinking. This will save time later.

Later in the process you may want to look back on the purpose and see if it needs to be re-thought.

Should the programme always be described at the beginning?

Some people want to hear all the details of what will happen, what will be the "outcomes" etc. This may be helpful for them but can take a long time. Other participants may become bored with all the details or wonder when things will actually start. Others don't want to know, preferring to discover for themselves and to be surprised. Think about what is necessary for the situation and what suits most people there. Are there ways that you can cater for everyone's needs?

If your process is an emergent one which needs to be open and exploratory, then don't feel you have to present a plan for every minute – i.e. don't make promises you cannot keep. This will frustrate many people, leaving them with a feeling of chaos. As the process unfolds invite people to suggest what needs to happen next – often they know better than you. We need to enable people to get used to emergent processes more and more because these kinds of processes are often more suitable for dealing with complex and uncertain issues in a way that involves everyone.

c) Helping people to land

Often participants come filled with other thoughts and feelings (problems at home, a stressful situation at work) and unless these distractions are aired, they may undermine the process.

As facilitators we can help this process by allowing time for a sharing of what is happening outside ("I have left my children with the neighbour and I am a bit worried" or "I promised my report by lunch"). Helping people to express what is worrying them helps them to put it aside for the moment, thus allowing them to focus better on the here and now.

See also *Preparing learners for learning – how?* in Chapter 4 of Barefoot Guide 2

Future Springboard… how to end a process well

As we end a workshop, meeting or strategy session it is time for us to review what we have finally learnt of value, what new ideas we have developed and what our next steps are into the future. If we do not leave enough time for this, it may mean that the whole process was just about talking and no action. This common complaint undermines people's energy for taking processes like this seriously.

Allowing fears and doubts to be expressed

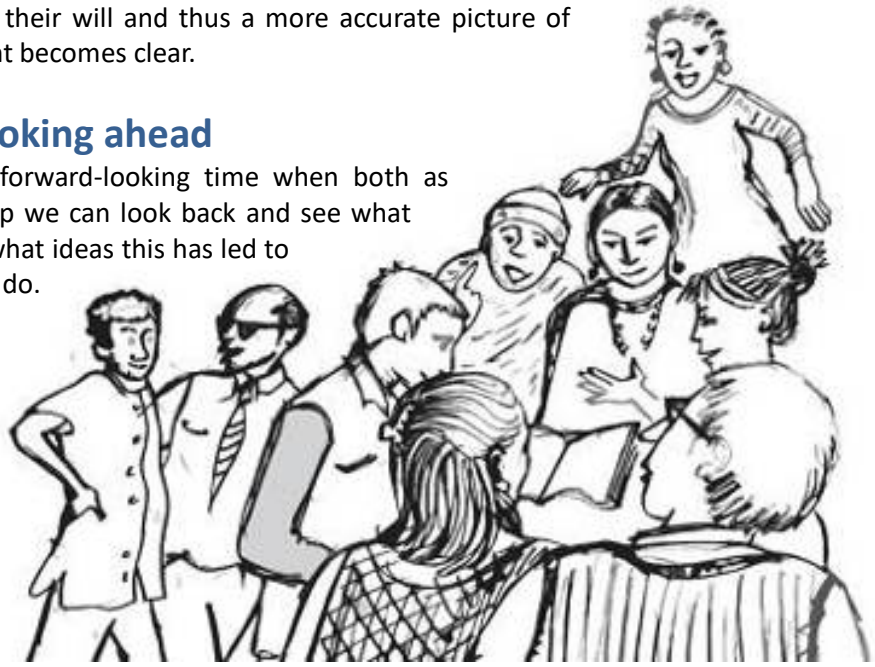
Before we leave a process, it is often vital to share *the doubts, fears, worries or reservations we still have.* We may have come up with good ideas, but if we do not voice any lingering fears or doubts then it is quite possible that we will not be fully committed or energised to act. Some leaders don't want to ask these questions, worried that it will give space for negative feelings to spoil what has been achieved. But the truth is that if these feelings are left unsaid then they do grow, after the meeting or workshop, and often undermine what was agreed. Often, if we are just given a chance to voice our fears or doubts, they suddenly seem quite manageable or even disappear.

From individual to collective conclusions

One secret to commitment is to build it out of individual reflection and preparation. Practically, in this context, it could mean giving a little time to individuals to sit and think for a few minutes about the questions below, before they turn to each other for discussion. This way each person can express their will and thus a more accurate picture of the collective commitment becomes clear.

Looking back… looking ahead

This is a reflective and forward-looking time when both as individuals and as a group we can look back and see what we have finally learned, what ideas this has led to and what we are going to do.



Some useful questions:

1) What are the most important learnings, questions and ideas we have reached in this session?

2) How are we feeling? What was helpful in this discussion, that enabled us to come to these insights or learnings? What was not helpful?
   This question will help you become more conscious of what works and enable you to improve your meetings in future.

3) What are we going to do next? Who? When?

What's the point of PowerPoint?

Powerpoint presentations have taken over. We are now treated to slides and slides of beautifully formatted text, with lovely bullets of all shapes and sizes, eye-catching backgrounds and even the occasional photograph and diagram. But how boring and oppressive PowerPoints can be, with page after bulleted page of more information than we can deal with, quickly losing our eye contact and relationship with the speaker. Frankly, I am starting to feel insulted by long PowerPoints and yearn for well-prepared presentations that engage me as a human being.

My colleague, Sue, recently gave a PowerPoint presentation at a major conference. But while she was speaking she only had a photo of a lovely garden bench on the screen. Now and then she paused to show a few photos on PowerPoint related to her talk, giving the listeners some relief from words. When she was telling her stories or giving her analysis, she was looking at the people and they were looking at her! Several people came to her afterwards to thank her for not subjecting them to the normal PowerPoint deluge of bulleted words!

PowerPoint has its uses particularly for representing images or dynamic diagrams. But a good story and a well-prepared and clear argument requires eye-to-eye connection between speaker and audience.

World Cafe versus PowerPoint

He wasn't the first person to give me lukewarm feedback on the regional forum. Its purpose was to provide an opportunity for people from different countries and organisations to learn from each other. Most people I asked were quite critical of the event.

Traditionally, the centrepiece of the forum was a PowerPoint update from each participant on the past year's activities. It doesn't sound so bad. And everybody is keen to give their own presentation and field questions. However, the truth is that it is exceptionally difficult to stay focused through 10 consecutive PowerPoint presentations. For many, the phrase "death by PowerPoint" elicits a wry smile. 90% of listeners move into a very passive listening (or snoozing) mode.

The rest of the meeting involved plenary discussions on a range of issues, normally being kicked off by another PowerPoint presentation. We agreed in this meeting that the following year we would hold an event focused around three 'working groups' dealing with issues deemed priorities by the participating organisations.

So the next year, we entered experimental mode and we reached agreement on what the three working group topics should be.

Meanwhile, I'd become aware of a range of methodologies for promoting group dialogue. We wanted to have an opportunity for everyone in the forum to connect with each other and share their news. So instead of PowerPoint updates, we decided to begin the forum with a 'World Cafe' activity asking participants to share their biggest work question. Running this activity involved taking people out of the formal meeting room and into another location decorated as a cafe with music, food and drinks.

It was a revelation. An intense hour and a half followed, full of noise, discussion and laughter. The quality of listening was in a different league to that I'd observed during the PowerPoint presentations.

Later, participants moved into their working groups. This required each person to play an active role in their group and reveal the deeper issues within their work.

Occasionally, someone would come up to me and ask, "When can I give my PowerPoint presentation?" And I would politely explain that this year, the World Cafe activity had replaced the PowerPoint updates.

At the end of the forum, the most common piece of feedback was, "we want to bring this way of doing meetings back to our own organisation."

(See page 29 for a sketch of World Cafe)

Creating the right space

If we want people to converse and learn together well then the spaces we use should promote these. Fresh air, natural light, a connection with nature and a warm atmosphere can make a big difference to how people relate to each other and how well they speak and learn together.

Diverse spaces

We are diverse beings, different from each other but also different in ourselves. If I sit in the same chair all day, or even the whole week, does this help me to open myself to different relationships and viewpoints? But if I am encouraged to move, to sometimes sit, sometimes stand or work outside, won't this help me to be more open and creative? We need outer variety to bring out our own inner variety.

How, as facilitators, can we offer variety, not only in our methods, but in the spaces into which we invite people to learn? How do we use the room, the chairs, the tables, the walls and floors, the garden or courtyard? Think of the learning, meeting or workshop space as a play area which can take a different shape for every session, which can encourage different kinds of relationships and a variety of encounters appropriate to the varied aims of the process.

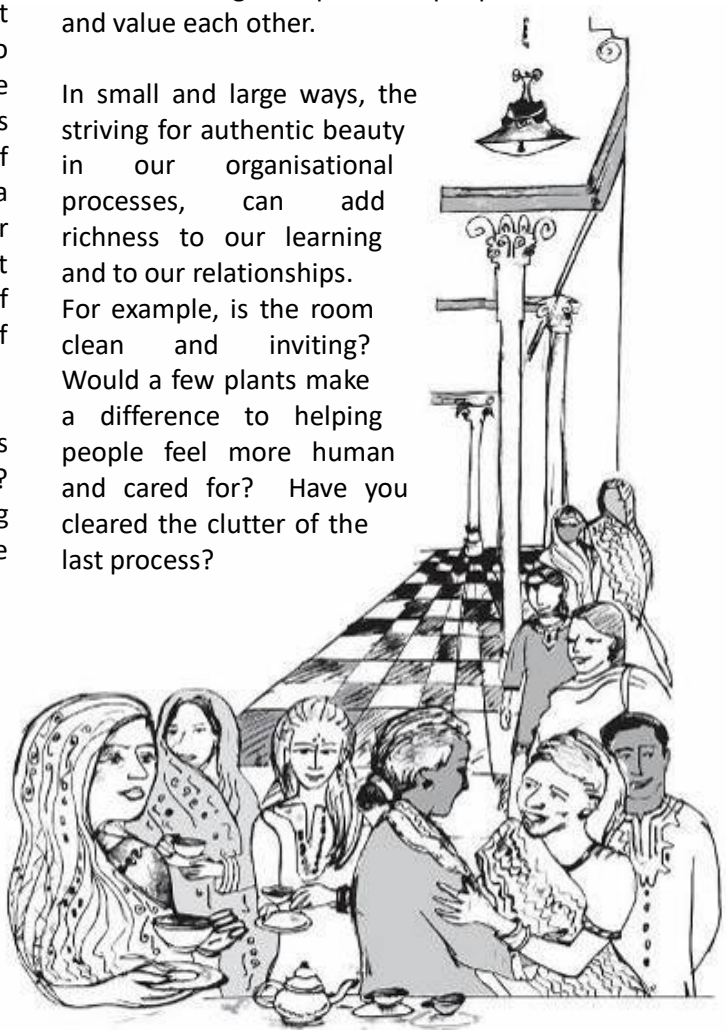
Why not ask the participants for their ideas about how they would like to the use the space? You may be surprised at the ideas that spring forth and it will help them to feel more ownership of the process.

Beautiful spaces

Many years ago I was asked, as a participant, to bring a colourful print or picture to a weeklong workshop and some music that I liked. I gave these in at registration and later when the process started we walked into the most beautiful room, vibrating with colour and images, mostly African prints, and filled with good music and luscious pot-plants. It was a great process, creative, engaging and fruitful. Although it was hard to prove what contribution the beautiful atmosphere made, I have no doubt that it made a difference in many obvious and more unseen ways.

In our urgent tasks of addressing the ills of the world many of us imagine that worrying about beauty, whether it is cultural or natural beauty, is a luxury we cannot afford. On the face of it this is understandable, when children are not eating or people are being unjustly imprisoned. But this is a misunderstanding of the deeper needs and forces of being human. Bringing the beauty out of our diverse cultures is itself deeply connected to unlocking the humanity and the human identity we need in order to fully deal with poverty and injustice. We are not talking of shallow, cosmetic, commercial beauty but the alternative to this. If we leave beauty to the market we are giving up on one of the essential elements of human culture that must flourish amongst empowered people who love and value each other.

In small and large ways, the striving for authentic beauty in our organisational processes, can add richness to our learning and to our relationships. For example, is the room clean and inviting? Would a few plants make a difference to helping people feel more human and cared for? Have you cleared the clutter of the last process?



Power in spaces

Where do you as the facilitator sit or stand when working? If you always stand in front you may well be indicating where the power lies in the group – with you. Often I will change my seat and sit with the participants rather than separate from them. Or move to the side ("a guide on the side"), leaving the front open for different people to move into at different times. You can also encourage the sharing of responsibility through asking participants to facilitate certain processes.

The way you deal with your power, as a facilitator, often has an important impact on the way the group deals with its own power issues, both within the group and between the group and outside forces. For example, if you bring interesting questions and information, from the front, this may empower, if this is what the group needs, but it may disempower, reinforcing the belief that they need strong leaders to supply the questions and feed them information, thus undermining their own leadership potential.

A useful question to keep asking yourself as a facilitator is:

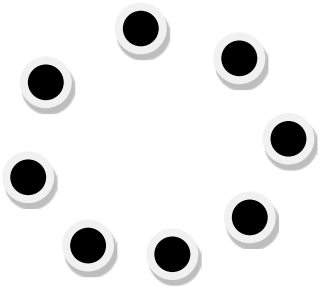
"Who is participating in whose process?"

Seating and tables

When laying out chairs and tables for learning processes, think about how you can help people to feel more human, more equal and also make it easier and more flexible for creative group processes. Shown here are some common layouts to consider.

The simple circle of chairs

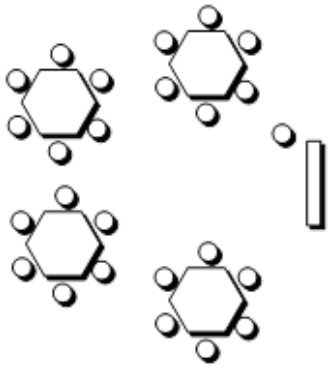
Where everyone is equal and can see each other eye-to eye. This can be small or large. It is useful for more intimate processes where people need to look each other in the eye and where people need to share experiences, tell their stories



Group tables (restaurant style)

Tables and chairs set up like this are useful for:

- Processes where people have to write a lot;
- Where there is a combination of presentations, working in pairs, groupwork and large group discussion. This arrangement saves time as people can simply turn in their seats for different arrangements
- World Café (see page 36);
- Processes where people do drawing, painting or sculpting.

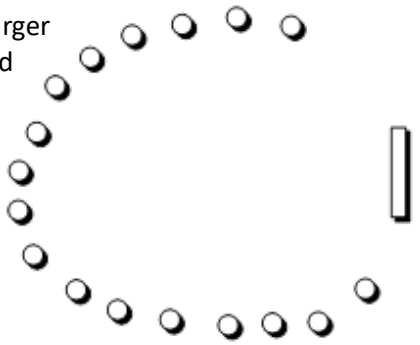


A semi-circle

Like a story circle but allows for presentations as well. The larger open space in the middle also enables people to move around the room for ice-breakers, role plays.

There are no tables in the way which encourages more openness.

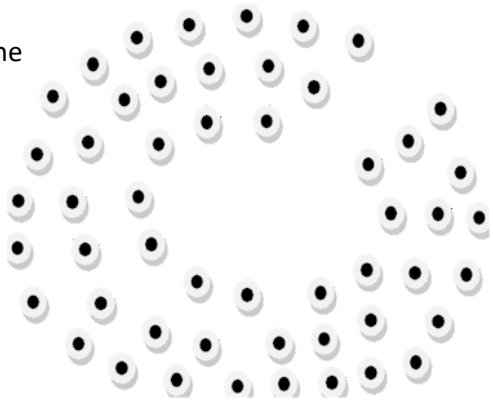
Some people like to sit on the floor if there are cushions. Good for larger group dialogue.



Circles in circles

Often when we hire a hall for a big meeting, we accept the rows and rows of chairs. But this reinforces power hierarchies and people cannot see each other.

Shown here is a layout of chairs that helps to break down barriers and encourage participation and a feeling of equality.



Helping people tell their stories well

Everyone is interesting if you look hard enough and everyone has an important story to tell from which we can all learn. Telling good stories of our experiences provides the foundation for good reflection and learning. So, helping people to tell their stories well is a key challenge for learning facilitators. Some people are natural storytellers but others find it difficult to share what they have experienced and need help.

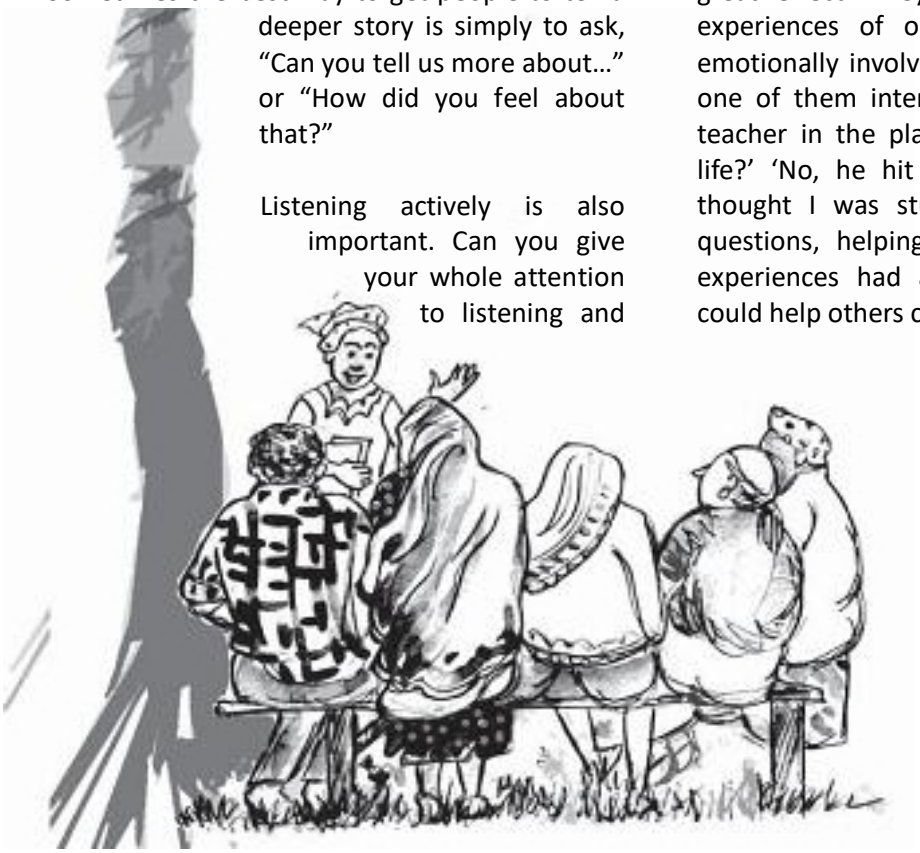
Many people think their experience is not interesting to others or worth sharing. Your curiosity as a facilitator can make a big difference.

If someone tells us a good story of an experience they have had then, as the listeners, we are drawn into the story, becoming part of it, as if the story is ours, our own experience. This makes learning easier, because we learn better from our own experience. This is why all ancient cultures use stories to teach and learn from.

Good questions help to guide people in telling their stories – what happened first? What happened next? What did you do then? How did he react? How did you feel?

Sometimes the best way to get people to tell a deeper story is simply to ask, "Can you tell us more about…" or "How did you feel about that?"

Listening actively is also important. Can you give your whole attention to listening and encourage other participants to do so as well. After the story, ask people to reflect back on what they heard, "What struck you? What were the important messages you heard here? What pictures or metaphors come to mind?"



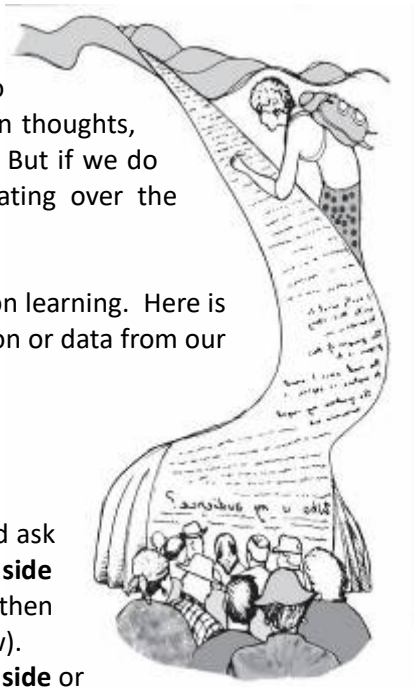
Where the situation you are working in still has a strong oral culture, then you can draw on the traditions of this to encourage people to tell their story. Ask them how they like to tell stories, and where it would be most enjoyable or conducive.

Drama can also be very effective. If someone has a story, they can tell it to a group of people who then act it out with the person.

I watched a group of deaf teenagers do this to great effect. They portrayed the childhood experiences of one boy. They all became emotionally involved in the story. Afterwards, one of them interviewed the boy: 'Was the teacher in the play like your teacher in real life?' 'No, he hit me harder than that. He thought I was stupid.' The audience asked questions, helping him understand how his experiences had affected him and how he could help others cope with similar situations.

Collecting better information from a story

One of the reasons we find it difficult to reflect more deeply is that we struggle to collect good enough information to reflect on. Often the missing information we need is hard to collect because it is not very visible – like the feelings, unspoken thoughts, assumptions, relationships and motivations of different people. But if we do not access and understand these things then we are just skating over the surface.



Relating experiences or telling stories is the key approach to action learning. Here is a simple technique to help us to get a better quality of information or data from our stories:

Getting Out the Inside Story

A. Tell or write down the story. If you are telling it you could ask someone to write down what you say **on the left-hand side** of a flipchart. If you are writing down the story yourself then do the same on a page. This is **the Outer Story** (see below).
B. After this has been done go back and, **on the right-hand side** or column, tell or write down some of the feelings, unspoken thoughts, assumptions, relationships and motivations of different people that you remember. Do this for each part of the story that you wrote in the first column. What were the less visible things happening – this is the **Inside Story**.
C. Now, in the right-hand column you have better, deeper information to use in your reflection and learning process.

A simple example:

The Outer Story

Do this first (look)
(the events as they unfolded, the more visible things that happened)

We were invited to a meeting with the women's group. They welcomed us warmly.

We brought some agenda items, questions and a typical MOU and asked for their ideas. We had some interesting discussion and talked about some possibilities. They looked at each other but not at us. They seemed shy.

The women were polite and did not say much. They said they were glad we had come and would contact us. The meeting was not long.

We have not heard from them, which has puzzled us. We are wondering if we should visit them again.

The Inside Story

Do this second (look again)
(the feelings, unspoken thoughts, assumptions, energ relationships, metaphors)

We were so excited – I think the women were also excited.

They seemed surprised when we brought our agenda, questions and MOU (we assumed they needed them). I felt a bit uneasy. Maybe they were disappointed. Looking back, I think we brought too much.

They were still being polite but they were not so warm. I imagine now that they saw us like the other NGOs whose projects they had joined.

I think we are more interested in this than them. I feel like a shopkeeper with no customers.

Can you see that the Inner Story helps you to get behind the scenes to where the real action was?

Tips on asking good questions

Good questions are the keys to unlocking good learnings. Our ability to ask our own good questions in an area that interests us can produce high levels of thinking and engagement. Simply put, good questions are more likely to lead to good answers. Badly formulated questions are more likely to mislead our thinking and discussions.

The power of *Action Learning* lies in our ability to ask effective questions about our experience, questions that help us to reflect well, out of which we can draw useful learnings and insights.

A few kinds of questions to think about...

We need to choose questions that suit the purpose of our inquiry:

Closed questions are useful when you want specific information that is already known to the person being questioned. A closed question is seeking either a Yes or No answer or more details, e.g. "Are you married? How many children do you have?"

Open questions do not invite a specific known answer – rather they open up new information, thinking and discussion, encouraging others to engage. e.g. "Can you say more about what happened? How do you cope with the stress? How do you feel about his criticism?"

Closed then open questions also work well together. Here you might be asking for more information or opening up the discussion, e.g. "Are you employed?" (closed question) "What do you like about your work? What frustrates you?" (follow-up open question).

What, when, where, who, why, how questions help us to analyse and understand what has occurred or the reasons for it, e.g. "When did that occur? Why was it helpful?"

BUT, be careful of using the question "Why?" inappropriately – e.g. "Why do you think you are struggling to make ends meet?" or "Why is there conflict?" People often feel interrogated and judged by this kind of question.

Questions often have underlying assumptions For example, "Why were you so irritated?" assumes you were so irritated. If these assumptions are not shared by the recipients they will either not be understood properly or even be found offensive.

So the way we ask a question can make a difference to the responses we will get and therefore careful construction of questions is needed by questioners, whether they are facilitators or participants.

Questions that don't have quick answers
The big questions we ask (e.g. "What is social change and development? What do I really want in life?"), do not have ready answers. We have to hold these questions over time, revisiting them and deepening our thinking around them. Consider this quote:

...I would like to beg you dear Sir, as well as I can, to have patience with everything unresolved in your heart and to try to love the questions themselves... Don't search for the answers, which could not be given to you now, because you would not be able to live them. And the point is to live everything. Live the questions now. Perhaps then, someday far in the future, you will gradually, without even noticing it, live your way into the answer.

Rainer Maria Rilke, 1903 - in *Letters to a Young Poet*

The Action Learning Cycle: deeper reflections and learning for more effective action

After we have an experience we often ask ourselves "What did we learn?" But this may not produce useful learnings. Why? Because for deeper learnings we first need to pause awhile to reflect on the experience, stepping back to really think about what happened and why. This way when we ask, "What did we learn?" we will have several insights to draw from.

Steps to deeper learnings

1. Action

The first step is to recall or remember what actually happened in as much detail as possible. Avoid analysing and drawing learnings this stage.

You can do this **individually** or **collectively**. If you do it collectively, then try reach some agreement on what happened. If you cannot agree then it shows how different people can experience the same event very differently. This difference may be worth reflecting on and reveal some interesting learnings.

What were you thinking and feeling? What were others thinking and feeling? What did people want at the time, what was motivating them? Try to bring out the "Inside Story". See page 26 above for a good method for this

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2. Reflection

Once you have recalled what has happened then you can start to reflect, to think about why things happened in the way that they did.

Helpful questions to ask are:

"What helped and what hindered?" and

"What assumptions did we make? Were they valid? What effect did they have?"

This often reveals key insights and learnings e.g." We assumed that everyone supported the chairperson but discovered that he was not trusted by the old people. This may explain their objections to the proposal.

"What really struck us?"

"Do we know of any other experiences or thinking that might help us look at this experience differently?"

Think about any similar experiences you have had. These may reveal some interesting patterns of behaviour – *e.g. we realised that on both occasions the women fell silent when the men started arguing amongst themselves.*

3. Learning

With some good reflections in your back pocket, you are now in a better position to begin to discuss **what you learned from the event**.

Looking at your reflections think about different learnings you can draw out. *These could be insights that you could apply to other situations.*

For example, from the one example above (of the men arguing) you may learn that when some people (often men) become argumentative and conflictual, that this can marginalise, alienate and silence other people (often women).

Questions to guide learning:

- *What would we have done differently?*
- *What was confirmed?*
- *What new questions have emerged?*
- *What other theories help us to deepen these learnings?*
- *What do you learn from this about the future actions or behaviours?*

You can start **making connections** between what you are discovering and your own current knowledge, skills and understandings. What theories, ideas, concepts and insights gained from your knowledge or past education have you applied or could you have applied in the situation? How helpful are these ideas? How could you use them to better effect or how could you modify them to make them more useful?

How does what you have learned from this event **relate to other events** in your life? What themes and similarities do you notice? What differences and contrasts can you see and how do these similarities and differences affect your view of your own development? Has your insight been deepened? Has your perspective been broadened? What have you appreciated about your own actions and behaviour and their impact? What have you learned from other people's actions and behaviour?

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4. Planning

You **look at the consequences** to applying these learnings. What will happen when you apply this learning?

You **identify any blocks** that may occur to stop you applying the learning. This is also where you may surface what you need to unlearn.

Then you **clarify your first steps** in applying the new learning. What will you do next? You are addressing the 'now what'.

Finally, you work out **how to really integrate** this new learning into your life through ongoing application.

Guiding questions for the Action Learning Cycle

ACTION

What significant things happened? Describe the events. Who was involved, what did they do? What picture emerges? How did people feel? What did they want?

PLANNING

So what does this mean for practice? What do we want? What do we want to do, to happen? How? What are we going to do differently? What do we have to let go of or stop doing? How will we not repeat the same mistake? What steps will we use to build these new insights into our practice?

REFLECTION

Why did it happen, what caused it? What helped, what hindered? What assumptions did we make? What assumptions did we make? Were they valid? What effect did they have? What effect did these assumptions have on what people did? What really struck us? Do we know of any other experiences or thinking that might help us look at this experience differently?

LEARNING

What would we have done differently? What did we learn, what new insights? What was confirmed? What new questions have emerged? What other theories help us to deepen these learnings?

Tips for using artistic activities in learning processes

"I can't draw!" "Don't ask me to sing, are you mad?" "I will embarrass myself if I dance!" Hands up if you are one of the many people who might say this if asked to do something artistic or creative! Many of us learnt at an early age that it was only worth doing these things if you were 'good' at them. We are afraid people will criticise us or laugh at us. If we are forced to sing or draw or dance or act then many of us freeze up.

We all have creativity inside us and anyone can encourage and grow that creativity in themselves and enjoy it – we all have an inner need to express ourselves creatively. Since change is a creative process it is important that we develop our creative capacities, or risk becoming technicians trying to engineer rather than cultivate development. Importantly, art and creativity enable deeper insights and learning. (See page 9 above for more about this.)

> *In Senegal there is a troupe of local artists (singers, dancers, storytellers, painters) who work with groups in villages to bring out their hidden creativity. While they are doing this they ask people, "What kind of future do you want? How can you create it?" In the process they surface enormous, energy, ideas and initiatives.*

If you introduce artistic activities, you may encounter some resistance. Don't let this put you off.

Guidelines for artistic activities

- **Insist that people try.** Be firm about using drawing, games, clay etc. – once learning comes they change their mind.
- **Invite a local artist regularly** to give an art class to the organisation or community group. Ask people to explore links between the creative experience they have and development or learning.
- **Don't try too many** different kinds of art forms or media at once – let people get used to one first. Different people take to different art forms so aim for variety in the longer term.
- **Change the venue** – have a meeting while walking through a forest, sit on the lawn.

- **Question the PowerPoint presentation**! - challenge people to present their ideas in different ways.
- **Introduce and encourage metaphors or** word pictures – ask 'if this problem were an animal what would it be?' and similar questions. You'll be surprised at the innovative solutions people then come up with.

Different art forms and some of their benefits

Singing – to build community, to help people find their voice, to express their emotion.
Clay sculpting – to get grounded, to get in touch with their will and to move to action.
Painting in colour – for healing and helping people to deal with trauma, developing inspiring pictures of the future. Colour conversations can help build relationships.
Drawing – to surface hidden issues and questions.
Movement and dance – to build cooperation and to reveal and build the will to act and move
Drama – helps people to explore and reveal issues in surprising ways, to more easily speak the truth from behind masks or roles.
Metaphors or word pictures – to describe difficult or hidden things that cannot be easily described in normal language.

How to work with resistance and "difficult" people

Some facilitators really struggle to deal with "difficult" people in learning activities. Others are able to contain them. And a few are able to turn the negative energy they bring into something positive, even transformative, for the whole group. Let's explore this a little… There are different kinds of "difficult" people:

Some people talk too much, demanding airtime and attention. This can spoil a whole activity. Be firm that everyone must get a chance and say that it is important that more voices are heard. Encourage quiet ones to speak. If the person becomes impossible it is sometimes worthwhile to call a quick break and speak to the person privately: "I notice you are contributing a lot. How can we get others to speak up?"

Some "difficult" people bring up hidden issues that others are unable to voice. These issues are not always easy to see and the "difficult" person may describe them in a way that annoys others. But it is often better that they come out than lie hidden. Ask the person to describe their feelings and specific experiences that created the issue. Encourage people to say if there is anything true in what is being said. See if any other people feel the same way. Often there is much to learn from these difficult people and the situation they create.

Some people always criticise and ask difficult questions. It's just who they are. The problem is that they often do so in a negative way that irritates or angers others. The first thing is for you to appreciate people like this, to realise that they can help a group to break out of its comfort zone or stuckness. But then how can you help them to do this more positively, in a way that is easier for people to hear? Can you speak to them in private, challenging them to bring their criticism more positively?

Some people have personal problems which lead to negative behaviour. The challenge is help them to put these aside, often through a personal chat in a tea break, even offering some personal support. Some people really don't want to be there and behave in difficult ways. Unless they have to participate, it might be worth helping them to leave until they are in a better state of mind.

How to deal with people who talk too much?

- First of all you should realise that it is your job to ensure that no-one dominates. Decide that you are going to face this challenge.
- If some people are dominating the discussion ask that people raise a hand before they speak. Then if someone who has not spoken raises their hand say, "We have not heard from Maya" and ask her to speak.
- You can say "Let's hear from those who have not spoken." And then ask someone, "Would you like to say something?" Do it gently.
- Don't be afraid to put up your hand (a "Stop" gesture") to stop someone talking if they are going on too long - ask them to please complete the point to give others a turn. Point out to them that if they say too much at once then people are likely to stop listening or only remember their last point.

Working with interpersonal conflict – some basics tips

Conflict is a complex and surprising beast, difficult to deal with but often pregnant with opportunities for learning and transformation. We are taught that conflict is bad and to be avoided. But some conflict is unavoidable and, if faced well, can lead to good change.

Conflict often comes out of differences or diversity. Building a culture of inclusion and appreciation for difference is one way to avoid or lessen conflict.

The real work of dealing with conflict is building empathy

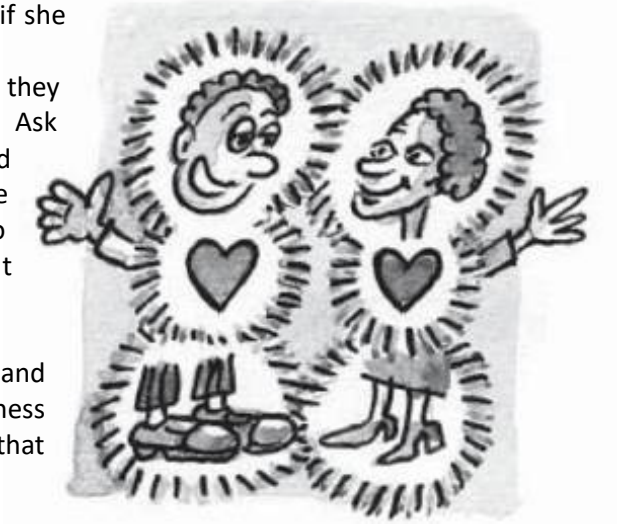
Conflict is almost always a difficult emotional experience for those involved. Surfacing, sharing and working with emotions is key. Building **empathy** for each other is usually the most important work, **helping each other not only see each other's point of view but really see how the other is feeling.** If I tell you how I am feeling because of what happened, this can build empathy in you for me and help you to take responsibility for your role. And vice-versa.

A basic approach

When trying to resolve conflict, it often helps to have a mediator, who is trusted by both parties, to hold a safe space, to keep the atmosphere respectful. This can be a formal session or it can be done informally, depending on how serious the situation is.

The mediator's work is to help the differing people to:

a) **Describe their experiences**, encouraging them *to be specific* about what they experienced that led to the conflict. If he says, "She undermined me!" then ask "What did she actually say?" to get a more specific answer like "She said people had complained to her about me." Don't allow vague statements.
b) **Say how they feel**. "I felt embarrassed in front of others when she said that."
c) **Say what they want**. "Next time, I would like it if she speaks to me in private first".
d) **Reflect and learn.** After each has revealed this they can be encouraged to respond to each other. Ask them if they can understand how the other acted in that way. Ask them if they could have responded differently and what they might do next time. What have they learnt about themselves?



Sometimes the causes of conflict are in the past and cannot be resolved, only forgiven. However, forgiveness is more likely and sincere if people can see that something valuable has been learnt.

C. Tips for different learning processes

Action Learning Sets

An Action Learning Set (ALS) is a small group of practitioners that meets regularly to help each other solve problems, deal with issues, start new initiatives etc. They are based on the Action Learning Cycle. (see Page 21)

They are similar to Reflect Circles, described in Chapter 7 of the BFG2.

Being a member of an ALS must be voluntary – don't force anyone to join! Hold the ALS meetings regularly, maybe once a month.

For each ALS session set aside 3 chunks of time:

a) 15 to 20 minutes to discuss how you wish to run the session, how it could be improved from the time before.

b) 1 hour for each member (e.g. if there are 4 members you need 4 hours). In each hour a different person is the focus of attention – they get to present their issues or problem, get feedback and ideas for the way forward. Choose someone different to facilitate for each person's hour. You should use the Action Learning Cycle as a guide. (See Page 23)

c) 20 minutes at the end to review major learnings and actions to be taken and to evaluate the session and make suggestions for improving it next time.

Study circles

In my organisation we occasionally choose an important book or article to collectively study. This serves many useful purposes and does not take up much time. Yet it has played a valuable role in helping practitioners to develop stronger conceptual skills and for gaining a better understanding of our real work. It also helps us to cultivate deeper conversations and language between us.

There are different ways to schedule these, whether weekly, 2-weekly or monthly. We put aside 2 hours every month. A chapter of the book we are studying (or it could be an article) is distributed 2 weeks before which we all read, before we gather to discuss it

Some tips for a successful Study Circle

Think carefully what you want to study and how. You could all bring some examples of books or readings to share, discuss and then agree which to start with. Choose one person to take responsibility for managing the whole process, ensuring people have the reading material on time and convening the circle at the agreed time and venue.

Don't give people too much to read – the idea is to study in depth.

While you read, highlight what strikes you. Participants are asked to highlight anything that really strikes them in the text as they read and to think about how it relates to their work.

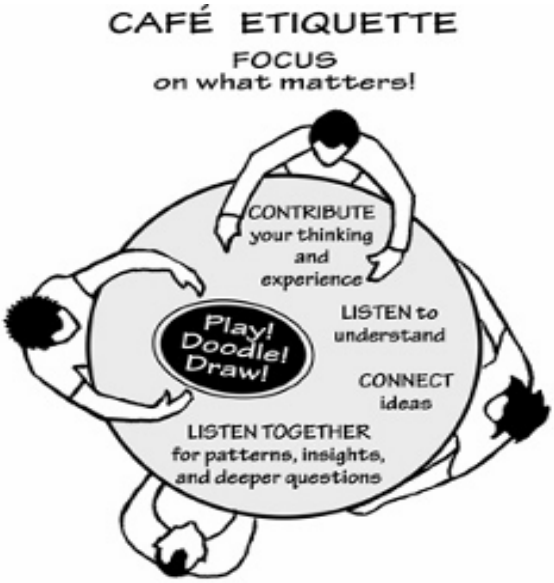
Ask one person each time to lead the discussion. They may be expected to read the text more closely than the others and to bring stimulating and challenging insights and questions. We have found it useful to go through the reading page by page, not reading it (because everyone has already read it) but giving each person a chance to stop us to share what they found interesting on that page, sparking a conversation.

Think about how to use the learnings. Time should be left to discuss what was learnt of particular value and how that could be applied to work.

World Café

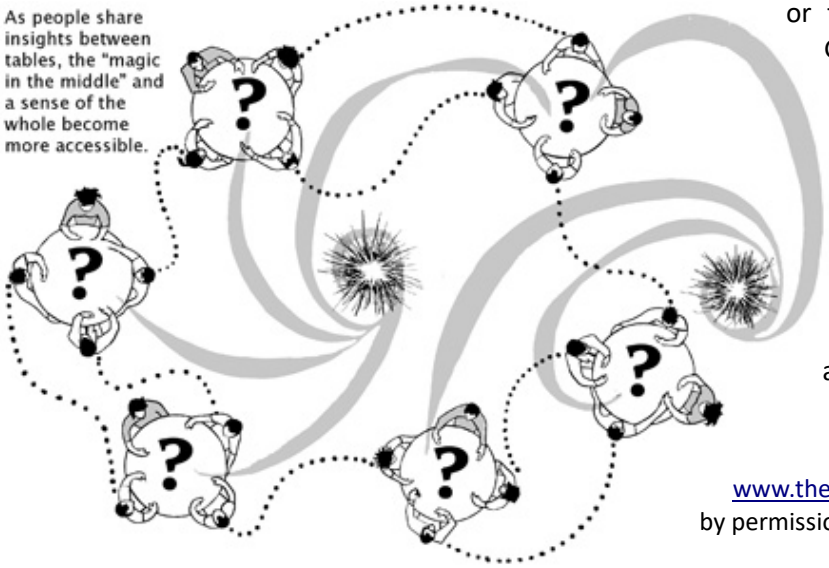
Are you tired of old ways of doing group work and presentations, where a topic is presented, people go into groups, discuss and then report back to the whole group? This can be fine sometimes but it can also get a bit boring. There are alternatives. For example, the World Café is a great participative and energetic way of getting everyone to participate in a different kind of group exercise:

In the World Café people begin in different groups, each group sitting around a table on which there is big flipchart paper (a kind of paper tablecloth). They discuss the topic, writing down their responses, thoughts, doodles etc. onto the "tablecloth". After 20 minutes or so the facilitator rings a bell or sings a song and all but one person from each table gets up and goes to another table. Usually they spread out to different tables to encourage cross-fertilization.



The ones who stay behind are the **table hosts** – they stay there for all the sessions, welcoming people from each table and showing them what the previous group discussed and encouraging them to bring and write down their ideas on the topic of that table. After another 20 minutes or so the signal is given again and everyone (except the hosts) move to another table for another round. Usually 3 or 4 rounds are enough. At the end the hosts can be asked to summarise the discussions they have gathered on their tablecloths. The whole process can take between 1 and 2 hours.

If you have several short presentations for a group you can also use World Café as an alternative, with the presenters being the hosts, giving their presentations several times to the small groups who visit their table every 20 minutes and giving space for their feedback and ideas. It can be a lot more interesting and participative than one presentation after another.



We have also used World Café to write "books" or field guides (like this Barefoot Guide), where each table is used to host a chapter which gets developed over several sessions and also connected and cross-fertilised in the process. Through this process everyone gets to brainstorm their ideas into each chapter which can be written up afterwards.

For more information see: www.theworldcafe.com " Pictures reprinted by permission from The World Café Community Foundation"

Team building

Team building is about helping people to get to know each other better, as people, to build empathy, caring, team spirit and trust, so that you can work better as a team. This may seem obvious but competitive forces inside organisations are often stronger and more destructive than we realise, separating us from each other and dividing our efforts, weakening what we can do together.

So what is the most effective way to build a team? Well, the good news is that any good organisational activity that involves a team, if successful, will help to build that team. We don't always have to have separate team building activities, although these can be helpful. If an organisational process has a human touch which helps people to enjoy each other's company while they are meeting or working together, then this will build team spirit and relationships. In our experience, a creative, exciting and productive strategic planning process is often the most effective team building experience.

Sometimes there is a need for a separate team building activity, specifically designed to help people work together better as a team. There are hundreds of ways to do this, from very simple to very involved ways. It may be enough to have lunch together regularly. It could be a good idea to share with each other your life stories. You could play a challenging game together where the way to "win" is to cooperate more closely
(competitive games can undermine teamwork).

You could sing or drum together. You could simply ask people what they would like to do to get to know each other better.

But be careful…

"Team building" is the most misused idea in organisations. If people are not getting along, if there is conflict or lack of communication the solution may not be a separate team building activity. It might be that the conflict is a result of many things, like different ideas of what the organisation should be doing, its purpose. Some people might be feeling discriminated against and resentful. A jolly team building process may only hide these deeper problems

Team building usually helps a reasonably healthy team get even healthier. But if a team (or organisation) is not in a good place, even in a hot or cold crisis, then team building may just be a plaster which covers the problem but does not solve it. Worse still, it may make people cynical, feeling that they are being patronised and not taken seriously.

Learning from Case Studies

Working with a case study to draw learnings for future action is an Action Learning process. See Chapter 12 which deals with Action Learning and will help you design your own process

Why case studies? Case studies are an in-depth opportunity for a team of people to take a real situation, reflect on it, draw substantial learnings and apply these learnings to future situations. Case studies can "live" where the person brings a story or challenge they are facing and needs help from the team to decide what to do next. Or the case story may be in the past and the emphasis is on drawing more general learnings for all.

On the BFG websites there is also some good advice for setting up and running case studies. Here are some essential tips:

Make it safe. It is important that the person bringing the case study is not attacked by others for being honest about a "mistake" they may have made. Allowing people to criticize each other is fatal to good learning and will lead to people being unwilling to honestly share their case stories in future. Indeed people should be praised for honest sharing.

Make it lively. Ensure that the story is well prepared and excludes unimportant information. Try to use visual aids. Try to tell the story as a real-life drama not as a boring report. Why is this? Because a when people listen to a well-told story they can imagine that they were there and so it almost becomes a part of their own experience – and people learn best from their own experience!

Look for the Inside Story. Try to make sure that the "Inside Story" is told. See "Collecting Data from a Story" above on page 19. Otherwise the analysis of the story may be superficial and the learnings obvious and disappointing.

Give time for individuals to collect their thoughts. Sometimes it helps to have someone writing the main points of the story onto a flipchart as it is being told, into left- and right-hand columns. If most of the story goes into the left-hand column, encourage the teller to give more "inside story" right hand column information, both during and after the story-telling.

Excuse the story-teller. When the team is analysing the story it is often a good idea for the story-teller not to be there as this can stop people from making critical and unconsidered observations. The story-teller may get defensive and want to give more and more information. Bring them back to share and discuss the lessons learnt.

Reflection is the key to depth. Make sure that you don't rush into drawing learnings or developing recommendations. If you do, these will probably be superficial and misguided. Spend good time reflecting, trying to understand what was really happening.

When the analysis and drawing of learnings is complete you may then invite the story-teller back and discuss the way forward.

Supervision, Mentoring and Coaching

Many healthy organisations use different combinations of personal supervision, coaching and mentoring to support individual staff members. In some organisations these are formalised, in others very informal and sporadic. Is your organisation using these vital sources of support and productivity in the most fruitful way? Making them more formal and regular may really help to improve both individual and organisational performance.

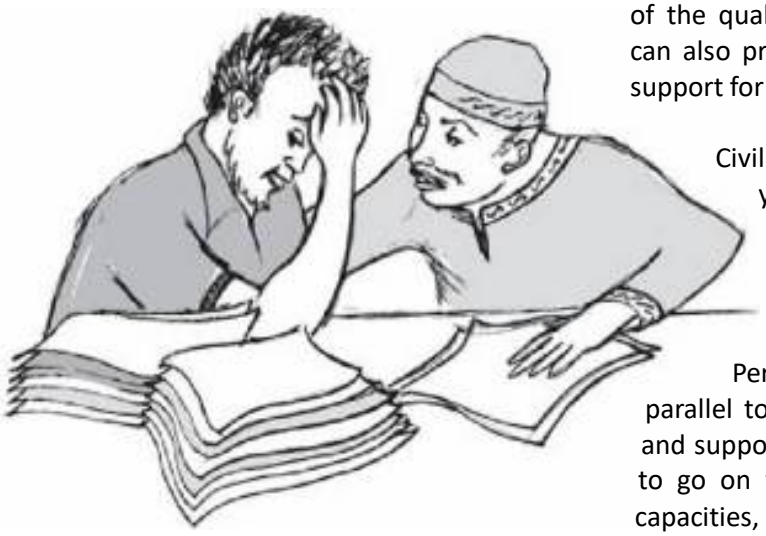
Supervision

Individual staff members usually need a personal supervisor who enables each of them to be clear about their role and expected achievements and gives them regular feedback and emotional support. Without feedback, people often become insecure or resentful, which will affect their productivity.

Out of individual supervision sessions, supervisors can provide important feedback to the organisation, alerting it to issues, problems or possibilities that the individual may not easily share in meetings. Confidentiality can still be respected. Supervisors can also help staff members to better learn about and understand organisational culture, policy and practice.

Mentoring

Good mentors are useful to help staff members who are taking on difficult new responsibilities. A mentor need not have organisational authority over the individual. Some organisations engage seasoned, retired



practitioners to provide wise guidance and counsel to new staff members. The mentor helps the staff member to understand the practice as it has developed over the years, to show them the ropes, to share experience and wisdom, a bit like a master/apprentice relationship. A good mentor can inspire, support, help develop a depth of practice and cultivate in staff members a higher expectation of the quality of practice required. A mentor can also provide good reading materials and a support for a study programme.

Civil society organisations, with their youthful and activist cultures, have lost sight of this age-old approach to learning, or do so in very loose, ad hoc ways.

Personal supervision can continue, parallel to this, to provide regular task clarity and support. The staff member may also need to go on training courses to develop certain capacities, but they should also be helped to apply their new learnings and skills in the work context, by the supervisor and/or mentor.

Staff members need to be appreciated and rewarded for being open about their struggles, as these become the key fuel for learning and improving their practice. If lots of pressure is put on them to produce results they may become anxious and insecure and start to cover up what is not going well, even to exaggerate their achievements, especially as they are eager to please – a very dangerous development that will undermine the whole practice.

Coaching

As the staff member gains more experience they will need help to learn more systematically from this experience. This is where a coach becomes more useful. Different from a mentor, a coach helps people to learn more from their own experience rather than from the mentor's past experience. Most useful here is the action learning cycle as a core process, enabling them to work more consciously, responsibly and independently. The personal supervisor can play this role or another person can be contracted to do so.

As time progresses people need to be given more responsibility and authority over their own work but will still need emotional support from supervisor and coach.

Eventually as they become more empowered they will start to appreciate space, with more delegation and less frequent supervision, requiring less one-way support and direction from the organisation. If they have had good experience with supervisors, mentors and coaches they are likely to become useful in these roles for other, newer, staff members.

Skills development

When new people are employed or move into new roles attention needs to be paid to their skills. Enormous investments are made in skills, for good reason, but unfortunately these are not always made wisely. Consider these points and tips:

First be clear about role and purpose of the job. Before sending people on a skills development process make quite sure that the purpose and role of that person is clear to them and that they are sufficiently motivated, that they see what is expected of them. If not, it is quite possible they will learn or pay attention to the wrong things.

See if confidence is what is really needed. Find out what the person is already capable of doing. They may tell you they don't have the skills but it is possible they know a lot but don't have the confidence to use their knowledge. In which case, they may only need some supportive coaching to encourage them to do the new work.

Be careful about importing conflicting approaches. If you are sending someone on a course, no matter how good, are they going to come back with ideas and approaches that are very different to those of their colleagues? This may be healthy, injecting new ideas into the organisation, but if not managed carefully it may lead to division and conflict. It may be wise to send the whole team or bring the course in-house.

Is there more space to fly with new wings? A newly empowered staff member returning from a course may become unhappy if they find that they cannot apply their new skills in the organisation because "the way we do things around here" is too strong. There is a good chance they will fly to an organisation that does give them space!

Ensure that the new skills are immediately applied and practised. New skills will quickly be lost if they are not immediately applied.

There are many ways to acquire skills – use them. Quite often a combination of approaches is what is required to help someone grow capabilities for a new job. For example, a person could spend a day or two with someone in another organisation who has experience in that field, followed by a short course and backed up with study materials and coaching. Civil society organisations tend to have two approaches: find out for yourself, on-the-job; or a short course. This may be cheaper in the short-term but the truth is that many organisations continue to amateurishly underperform as a result. Wisely investing in people is cheaper in the long-run, and gets the job done!

Strategic thinking, strategic conversations

"Without leaps of imagination, or dreaming, we lose the excitement of possibilities. Dreaming, after all, is a form of planning."

Gloria Steinem

" Big thinking precedes great achievement."

Wilfred Peterson

Strategic thinking and strategic planning processes provide wonderful opportunity to renew life and meaning in an organisation. These kinds of processes are part of the larger Action Learning cycles of organisations where, after reflections and evaluations, we take what we have learnt (and unlearnt) from experience, ask the big why and where questions and then turn the answers into new cycles and initiatives of work.

When we strategise we stand back and look at the whole. We try to think big, sometimes with a confidence that we may not yet have, in reality. But that's OK.

Tips to enhancing your strategic processes

Strategic planning – an event or a continuous process?

Most civil society organisations do their strategic thinking every few years, in line with donor cycles. But is this OK? The context and circumstances of social change are so volatile nowadays that one of the reasons we see so many organisations struggling to survive is that they are simply not keeping up with the times. There is a strong case to be made for continuous strategic conversations, putting aside regular time, every month or two, to review progress and rethink strategy and approach.

Involve more people, somehow. Unless we think and act more in collaboration, we will become irrelevant. Individual action will not address complex challenges.
Experience suggests that if we get together with stakeholders and potential collaborators and share our experiences and learn from each other, then we prepare the soil in which we can plant the seeds of collaboration.

Be creative by doing creative activities.

Future thinking is, by definition, creative thinking. We cannot logically plan our future visions and strategies. Future planning requires acts of imagination combined with sharp analysis. Look for creative methods to enable your strategic thinking and conversations. Invite artists and writers to stimulate you, use metaphors and pictures to imagine the future, to help you to think outside of the boxes of the present.

Management meetings

"We haven't had a management meeting for nine months!" My colleague complained.

It was true. That's not to say that management discussions weren't taking place regularly. But it was more a matter of who happened to be around, and who was near the boss's office when an issue presented itself.

We'd talked about having a monthly management meeting. But we all travelled so much, that none of us had made this a priority, including the boss. A proposal was made that we should aim for a quarterly management meeting. It would be 'offsite'. It would last a full day. Lunch was included. And there would be no agenda. We agreed that none of us would take holidays when these meetings took place. They would have to be a priority.

So, how did it go? Well, we were all determined to make it work. In fact, I remember one of my colleagues attending a meeting while suffering from Dengue fever, and so lying on the floor while raising an important issue. But more interesting than what happened in the meetings was what happened around them.

If donors were planning a visit, they were asked to come during this week. We would add another day to our meeting at which all donors were welcomed. This became a regular part of the rhythm and it also freed the rest of our time from dealing with donors. Other meetings that required the input from all management team members were also scheduled for the same week. By establishing a rhythm for our management meetings, we not only made our lives easier, but we contributed to a rhythm amongst our partners as well.

Try these ideas…

- Agenda items that are positive questions – how can we improve staff relations? How can we make this programme more effective? Rather than statements of 'the problem'.
- Give time for personal reflection or discussing an issue in pairs rather than launching immediately into a group discussion.
- Have a learning section – invite people to tell what they have learnt since the last meeting – this shows that learning is valued and invites discussion about how the learning can be applied.
- Watch a short film on an aspect of work and discuss what we can be learnt from it for your own practice.
- Have a section called ' what didn't work' and use it to show that talking about failures can help us learn. Transform failures into valuable learning.

Meetings often become rituals – and that is fine if it prioritises time for learning as in the example above. But if you start to sleepwalk through the ritual, perhaps you need to try running them in a different way to wake everyone up. Or have an annual or 6-month check up to see if they are still relevant and fulfilling the needs that they were set up to address.

" The best way to have a good idea is to have a lot of ideas."- *Dr. Linus Pauli*

D. Some Readings and Tools

Facilitation skills

Leadership

Facilitators have to achieve a balance of qualities similar to those that a leader should strive for. Experience has shown that, generally speaking, organisations embody six cultural sub-types in different proportions and balances. The essence of real leadership is to assist the organisation in the creation of new, appropriate cultures.

The cultural sub-types are divided into three groups of two each. Each group is described in terms of polarities, and the essence of leadership towards cultural change is to find a creative meeting place between the polarities, because none of the poles are complete or effective in themselves.

Cultural types

	Manifestation	**Archetype**
Group 1	Task/People	Masculine/Feminine
Group 2	Vision/Opportunity	Ideal/Reality
Group 3	Expert/Experience	Future/Past

QUALITIES OF CULTURAL TYPES

Group 1

Task

The "task" polarity is characterised by the following qualities:
Short-term orientation; highly operational; efficient; focused; sees people as costs; uses military language; sees environment as hostile; dynamic; thrusting; aggressive; has no concept of development.

Weaknesses: Reactive, not proactive; has no time to think; is brittle and non-developmental.

People

The "people" polarity is characterised by the following qualities: Open; trusting; team emphasis; growth; development; nurturing; long-term policies; emphasis on the whole human being; harmony; learning climate; listening attitude.

Weaknesses: Listen but don't do; a bit slow; too comfortable; not really alert.
When these polarities are brought together in a healthy balance, new life can be born. (Adapted from a talk by Mario van Boeschoten of Transform, England.)

Group 2

Vision

The "vision" polarity is characterised by the following:
Mission statement; values; intentions; clarity of purpose; role; long-term orientation; imagination; meaning; quality; motivation. Weaknesses: Often has a top-down approach which leads to frustration or cynicism at lower levels), can become susceptible to illusions.

Opportunities
The "opportunities" polarity is characterised by:
Movement; quickness; ambition; continually on the lookout; high level of skills, but individual; out on your own; flexible; speedy.

Weaknesses: As open to sudden disaster as to sudden success.

Group 3
Expert
The "expert" polarity is characterised by the following:
The latest is the best; will tell everyone what to do; carries authority; choices not based on morality, but on cleverness, what's new, gimmicks.

Weaknesses: Dispersed, all over the place, formulaic recipes, can become unrealistic.

Experience
The "experience" polarity is characterised by the following:
Guidelines from the past; makes decisions according to experience.

Weaknesses: Slow moving, outdated.

A balance between these polarities must be found for success.

Qualities of leadership
What does all this mean on an individual level for the leader or facilitator? Let's transpose the nouns we have used so far into verbs for action.

Noun	***Verb***
Task	Confronting
People	Supporting
Vision	Giving meaning
Opportunities	Mobilising
Expert	Focusing
Experience	Grounding

We need to find balance, the mid-point between the six cultures (each one incomplete in itself) in order to assist in generating new and viable organisational forms to meet new and changing circumstances. We need to be both confronting and supporting, and know when each is appropriate. We need to help provide vision and meaning for the activities of an initiative and for its staff, but balance this with mobilising them into using the opportunities. We need to help the organisation focus its activities and ground them in achievable aims and objectives.

For leaders and facilitators, the picture of the hawk is an appropriate one, a balance which needs to be nurtured in order to do the good. The hawk glides high in the sky, calm, relaxed; everything is seen from its high vantage point; the overview is all-encompassing and diffuse. But within the overall, generalised picture with its shades and textures and patterns, the tiny individual mouse is suddenly seen. The ability to focus becomes keen, and the hawk will swoop down, accurately and efficiently, to isolate one tiny element within a vast perspective.

Facilitation
The wise leader's ability does not rest on techniques, gimmicks or set exercises. The method of awareness-of-process applies to all people and all situations. The leader's personal state of consciousness creates a climate of openness. Centre and ground give the leader stability, flexibility,

and endurance. Because the leader sees clearly, the leader can shed light on others.

Facilitation skills involve the gathering of accurate information about how people are relating to each other and the materials presented, and intervening to clarify the dynamics of the situation. Effective facilitation involves several elements:

1. A holistic orientation to oneself and others
2. Observation skills for gathering information
3. Intervention skills for clarifying interaction
4. Self-development

A model of facilitation

Soft skills

Observation:

Noticing a range of verbal, non-verbal cues of self and others, noticing group themes, patterns, images; noticing incongruence in communication

Intervention:

Formulating tentative guesses about meaning of behaviours that are observed without interpretation; simply changing to a response to a person or group without giving direct feedback.

Hard skills

Observation:

Pinpointing specific behaviour; interpreting meaning and consequences of behaviour; judging likely outcomes of repeated patterns

Intervention:

Confrontation of specific behaviour, suggestions or advocacy for change; teaching a specific skill;stopping self from a biased intervention.

Holistic orientation

A holistic orientation means working with the two forces mentioned in the training model; yin and yang, soft and hard. A soft orientation is an open, aware, receptive stance, increasing open-mindedness, and flexibility. It enhances the consultant's ability to perceive people and events in a systematic way, seeing how all the pieces and patterns fit together, it requires a tolerance for ambiguity. For example, while watching a team- building session, you may notice the group members joke a lot and complement each other. So, you could surmise they are a supportive group. However, by waiting, remaining "soft", and being open to a wide range of information, you may also notice that each round of joviality is preceded by strong criticism. The group interaction could have more to do with relieving stress of struggles for control and influence than with affection and support, as the initial interaction may have suggested. This could lead to a different intervention.

A hard orientation is important for sorting out, categorising, and judging information — narrowing and defining the meanings of behaviour. In the example above, you might describe the behaviour to the group, label it as a release of tension, and suggest ways in which a group could handle their conflict more productively.

"The leader can act as a warrior or as a healer. As a warrior, the leader acts with power and decision. That is the Yang or masculine aspect of leadership. Most of the time, however, the leader acts as a healer and is in an open, receptive, and nourishing state. That is the feminine or Yin aspect of leadership. This mixture of doing and being, of warrior and healer, is both productive and potent."

(Heider, p.55)

Both orientations can be recognised by physiological, perceptual and psychological indicators (Friedman, 1978). These indicators are helpful in two ways: 1) By noticing your own mind/body state, you can know which orientation you are in, and 2) you can alter your orientation by changing these indicators. For example, a consultant may be making a number of interventions which "bounce off" the group or even irritate them. This is probably because the person is in a hard orientation at an inappropriate time. Instead, he/she should shift to a soft focus and wait for a fuller, more accurate sense of what is happening in the interaction. Then his/her interventions will be more effective.

"... the wise leader who loses the sense of immediacy becomes quiet and lets all effort go until a sense of clarity and consciousness returns" (Heider, p. 75)

The physiological characteristics of a soft state include a relaxed, centred body, low blood pressure, heart rate, and blood flow to the muscles. Breathing is slow, even and deep. Eyes have a quality of softness rather than a quality of tenseness and staring. In contrast, hard listening is characterised by higher blood pressure, increased heart rate, shallow breathing, and contracted muscles. The body is ready for action and there is a quickness of response.

Perceptually, soft listening is non-judgmental and non-focused. It includes a heightened sensitivity to a diverse set of stimuli, such as voice tones, gestures, facial expressions, posture, the way the group is arranged in the room; and involves hearing another's entire message, rather than quickly jumping to conclusions about its meaning. On the other hand, hard listening is focused. There is selectivity in perceiving communication messages and a quickness to respond and to offer solutions.

Psychologically, when practitioners are listening softly, they are interested in interpersonal needs of safety, security, and closeness. In order to listen and perceive others' needs accurately, facilitators must be in a low state of interpersonal need themselves, making few demands on those to whom they are listening. In other words, soft listening is accepting and tolerant of where clients are, rather than pushing them to be or do something else. In contrast, hard listening is related to interpersonal needs of power and control. That is, when facilitators are coming from a hard orientation, they are directing participants to move in a certain way and are interested in efficiency, structure, and precision. Responses that emerge from hard listening are often prescriptive and sometimes judgmental.

As described, soft and hard orientations influence facilitators' awareness, which, in turn, directs the interventions they make. Holistic facilitation includes an ability to use and sequence soft and hard orientations appropriately.

Observation skills

As the facilitation model indicates, observation skills involve the gathering of information (the diagnosis) about what is happening in a situation and can be done from a hard or soft perspective. Soft observation comes from a meditative stance (described above) and involves noticing a range of behaviour (verbal and non-verbal), noticing group patterns (what occurs in cycles), and developing images and metaphors for the group. Soft observation has less to do with observing a specific dimension of group interaction (power and control, for example) than it does seeing the large picture, the ebb and flow of interaction, getting the feel of the group. It is like losing oneself in the dark without trying to analyse immediately what is going on.

Using metaphor is a central means of soft observation. Metaphor comes from right-brain thinking and is quite helpful in getting the full picture of the group process and in feeding back information to a group in a fun, supportive way. For example, clients at a radio station could not understand the tension they felt, especially when individuals were perceived as highly competent. When asked what

the station reminded them of, they replied: "The front office is like an army camp, and the production offices like Disneyland." From these images, we then could ask who plays the role of sergeant and how does he interact with Disney characters like Goofy and Donald Duck. How are their roles supportive of each other? In conflict? Are there ways to change some interactions that would allow the front office to have more fun and the back to be more responsible? What image would encompass all our tasks and help us be more cooperative?

When the consultant or group comes up with an image that really fits the culture of the group, the metaphor will expand. People will use the image spontaneously and use it to explain their interaction, especially the most hidden part. Reference to the image will usually continue until a new one emerges, at which time the consultant can tell a major change has taken place.

Metaphor is powerful partially because it bypasses left-brain rationality and rationalisations. Clients less often argue with an image (if it fits) than with logical explanations of what is happening. They often become playful and humorous, qualities that give distance to the pain often being experienced. With the distance comes the ability to create workable solutions.

Hard observation skills, on the other hand, use more of the rational, sensing mind. They require a consultant to focus on specific behaviours that may be indicative of key aspects of the group. If the consultant is trying to understand the culture of a group or organisation, for example, he/she would want to focus specifically on the artefacts of the culture: jokes, environment, written materials of the organisation, issues that are quickly denied (see Schein, 1985). If the consultant is trying to understand the way conflict is handled, he/she would want to be able to tell clients specific behaviours they do to escalate conflict. Effective hard observation necessitates an understanding of the theoretical dimensions of whatever phenomena you are observing - key elements in group interaction, organisational behaviour, interpersonal communication, group culture - and the behaviours that typically indicate those elements.

Practitioners weak in facilitation skills have not developed their observation skills. They intervene and give feedback to clients, but either cannot do so from a metaphoric perspective when needed or cannot say the specific behaviours they have noticed that lead them to the conclusions they have drawn. In effect, clients are at the mercy of the consultant's interpretation: they can accept it and thus become dependent on the consultant or can reject it and thus are no further along in improving their work.

Intervention skills

These skills can also be viewed from a "soft" and "hard" perspective. Soft ones involve formulating tentative guesses about the meaning of behaviour, reflecting behaviours that are observed without interpretation, indicating to clients the function of their behaviour (eg. when a meeting is run in a certain way, little participation occurs), or simply changing a response to a person or group without giving direct feedback. The latter could be acting in a collaborative way in contracting with a client when he/she is accustomed to behaving unilaterally. Soft interventions involve waiting longer than usual to intervene, for instance, in a team-building session; trusting that people can and will reach their own conclusions about productive behaviour; and providing a structure for people to arrive at their own answers.

Harsh interventions are a warning that the leader may be uncentred or have an emotional attachment to whatever is happening. A special awareness is called for. Even if harsh interventions succeed brilliantly, there is no cause for celebration. There has been injury. Someone's process has been violated. Later on, the person whose process has been violated may well become less open and more defensive. There will be a deeper resistance and possibly resentment. While they may do what you tell them to do at the time, they will cringe inwardly, grow confused and plot revenge. That is why your victory is actually a failure. (Heider, P. 6)

Hard intervention skills involve confrontation of specific behaviour; suggestions for advocacy for change; teaching a specific skill; indicating that you as consultant will not continue if certain behaviours persist. Hard intervention also may involve facilitators indicating they are concerned or worried about certain dynamics and that dire consequences may occur if something is not changed.

To judge the kinds of intervention needed, practitioners need an understanding of the phase of development of the client and at what point they are being asked to intervene. They also need to be aware of their level of development in terms of their soft and hard sides, their feminine and masculine, in order to make interventions congruent.

Self-development

In the final analysis, facilitators themselves are the best or worst tools they have. We are the ones doing the perceiving and intervening, and with greater self-development we can choose and implement more styles, interact effectively with more kinds of people, and be more adaptable to change.

What is the self-developed trainer? Fundamentally, that person is aware and accepting of a wide range of feelings, thoughts, and behaviours. The parts of self which facilitators accept in themselves are the parts they can deal with openly and non-judgmentally in others. Similarly, the parts of themselves they deny or condemn are the ones that will be ignored or judged in others. For example, if you are uncomfortable with anger, you cannot remain centred and aware when that feeling arises in others.

A couple of images are helpful in expanding a vision of the self. One is the self as a community of people, all of whom are different and who need to be enfranchised (empowered) for them to contribute their best efforts. Another image is that of an orchestra: to play a beautiful, rich, harmonious concert you must have all the members of your orchestra present and practised; they all need to know the score. None can be judged better than others (a good conductor does not favour the violins and hate the flutes); depending on the musical piece, the piano or the horns may be more pronounced; and the conductor is in charge. His/her goal is the effective execution of the piece; and so he/she can use any or all of the orchestra to accomplish that end.

To prepare your community or orchestra you can begin noticing what emotions are not typically part of your everyday life and work on developing recognition and acceptance of those feelings. A specific exercise is to ask "who am I not?" and to generate a list of characteristics you would strongly reject. They may be deviousness, unfairness, laziness, even creativity or other positives. The assumption is that whatever is denied is actually a part of you and that by denying these traits you make it harder to contact the positive dimensions in each characteristic. For example, deviousness is closely allied to creativity or getting what you want. When you censor any hint of deviousness, you also give away a great deal of potential creativity. "Laziness" could be closely allied with taking time out for yourself and "doing nothing" in order to replenish your energy. If you keep labelling that part of you "lazy" you also cannot take time alone. The challenge is to accept the trait and transform it into a positive use, in much the same way as you would transform the energy of a group. (see Yarbrough, 1983, 1985)

Clearly the assumption is Jungian in that at the heart of every negative quality is a positive dimension. The goal of self-development ("individuation" in Jung's terms; "actualisation" in Maslow's) is to re-own as many human qualities as possible. Then you have a full community of resources internally to use whenever needed. When working with police, you may need your "tough customer" or your baton. When with the ladies' club, your "southern belle" or your flute. When you need to know the covert issues in an organisation, you may need your town gossip. You can work with a large array of people and situations when there are many dimensions of the self.

The consequences of self-development are fairly clear. Physically, you have more energy and are more relaxed than when you try to live up to many prescriptions or "shoulds" for behaviour. Reich (1949) and Lowen (1976) believe that bodies take on the characteristics of disowned parts of the personality. Reich gave the name of "muscular armour" to those groups of muscles people keep in chronic tension as not to feel unwanted dimensions of their experience.

Tenseness, in turn, lessens the ability to sense feelings and listen openly to others, making effective observation difficult. Greater self-integration also encourages congruent communication (consistent verbal and non-verbal messages); increased choices and flexibility of communication styles, and positive regard for others.

This view of self as multi-faceted, in process, is contrasted to the perspective of self as something to be developed. Facilitators who operate on the second perspective must be on top of everything that comes up in order to be in control. In turn, control means that new thoughts, feelings, and people will be threatening, will tend to throw trainers off guard, and, therefore, will be suppressed. Thus, the integration cycle is reversed: the body is tightened to suppress response; perceptions of self and others are made more rigid - only safe, familiar feelings and behaviours in self and others are attended to; others are ignored or disdained; communication is increasingly incongruent since the disowned parties leak through the non-verbal channels in contradiction to the verbal communication; honest, open communication becomes more difficult since those qualities are based on acceptance of self and others, and on and on.

Self-development, then, is a basis for effective observation and intervention skills. Facilitators cannot simply buy these skills like tape recordings to insert in themselves. Instead, they must understand and have developed the consciousness that is congruent with the skills.

"Beginners acquire new theories and techniques until their minds are cluttered with options. Advanced students forget their many options. They allow the theories and techniques that they have learned to recede into the background. Learn to unclutter your mind. Learn to simplify your work. As you rely less and less on knowing just what to do, your work will become more direct and more powerful. You will discover that the quality of your consciousness is more potent than any technique or theory or interpretation. Learn how fruitful the blocked group or individual suddenly becomes when you give up trying to do just the right thing." (Heider, p.95)

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The Paradigm Shift – Fritjof Kapra

Extracted from "The Web of Life", by Fritjof Capra, Flamingo, 1997

The more we study the problems of our time the more we come to realise that they cannot be understood in isolation. They are systemic problems, which means they are interconnected and interdependent. Ultimately all the interconnected problems must be seen as just different facets of one single crisis, which is largely a crisis of perception.

From the systemic point of view the only solutions are those that are sustainable. Lester Brown of Worldwatch Institute defines a sustainable society as ….. "one that satisfies its needs without diminishing the prospects of future generations." The creation of sustainable communities is the greatest challenge of our time.

Most of us and especially our large social institutions subscribe to the concepts of an outdated worldview, a perception of reality inadequate for dealing with our globally inter-connected world. This new way of understanding is just starting. The politicians and leaders of our time fail to see how different problems are interrelated and how the solutions affect future generations.

The new concepts in physics have brought about a profound change in our worldview; from the mechanistic worldview of Descartes and Newton – to a holistic ecological view. The paradigm that is now receding has dominated western culture for several hundred years and has shaped modern western society and significantly influenced the rest of the world. Some of the entrenched ideas and values of this paradigm include:

a) A view of the universe as a mechanical system composed of elementary building blocks,
b) The view of the human body as a machine.
c) The view of life in society as a competitive struggle for existence.
d) A belief in unlimited material progress to be achieved through economic and technological growth.
e) A belief that a society which makes use of power to dominate and take advantage is following the basic law of nature.

All of the above assumptions have been fatefully challenged by recent events. And indeed a radical revision of them is occurring.

Deep ecology

The new paradigm may be called a holistic worldview, seeing the world as an integrated whole rather than a dissociated collection of parts. It may also be called an ecological view – if the term is used in a much broader and deeper sense than usual.

Deep ecological awareness recognises the fundamental interdependence of all phenomena and the fact that, as individuals and societies, we are all embedded in (and ultimately dependent on) the cyclical processes of nature.

Shallow ecology is anthropocentric (human centred). It views humans as above or outside nature and as the source of all value. It ascribes only instrumental or "use" value to nature.

Deep ecology is ecocentric and does not separate humans – or anything else – from the natural environment. It sees the world, not as a collection of isolated objects, but as a network of phenomena that are fundamentally interconnected and interdependent. Deep ecology recognises the intrinsic value of all living beings and views humans as one particular strand in the web of life.

When the concept of the human spirit is understood as the mode of consciousness in which the individual feels a sense of belonging, of connectedness to the cosmos as a whole, it becomes clear that ecological awareness is spiritual in its deepest sense.

Deep ecology asks deep questions about the very foundations of our modern, scientific, industrial, growth-oriented, materialistic worldview and way of life.

New values

Transition to the new paradigm demands more than new thinking (this could be done). To change the paradigm, we need to change not only in perceptions and thinking but also values. There is a connection between the shifts in thinking and values. In both the shift required is from **self-assertion** to **integration**. These two tendencies – the self-assertive and the integrative – are both essential aspects of all living systems. Neither is intrinsically good or bad. What is good or healthy is a dynamic balance; what is bad, or unhealthy, is imbalance – overemphasis of one tendency and neglect of the other.

Power in the sense of domination over others, is excessive self-assertion. The social system in which it is exerted most effectively is hierarchically ordered generally with men occupying the upper levels and women the lower levels. Most of these men, and many women have come to see their position in the hierarchy as part of their identity, and thus the shift to a different system of values creates existential fear in them.

However, there is another kind of power, one that is more appropriate for the new paradigm – power as influence of others. The ideal structure for exerting this power is the network, which is the central metaphor of ecology. The paradigm shift thus includes a shift in social organisation from hierarchies to networks.

Principles of a Developmental Approach

By Doug Reeler
from "Horizontal Learning - Engaging Freedom's Possibilities", CDRA Annual Report 2004/2005 – www.cdra.org.za

What are the principles that lie behind good practice? We present here four inter-connected principles that have exciting implications for working at depth and scale and can help us to deepen our appreciation of where the real work lies and to gauge the potential of approaches that want to be developmental.

The first principle is that development and the will or impulse to develop is natural and innate

In whichever state we may find people, they are constantly developing. They may or may not be developing healthily or in ways they like or are even conscious of, they may be inhibited to a point of stuckness in some places, but they have been developing long before development workers came into their lives and will continue to do so long after they have left. We cannot deliver development – it is already happening as a natural process that we need to read, respect and work with. That the will and capacity to develop may be hindered, half-buried or restricted, points to the primary challenge we face as practitioners: to help people to more consciously free themselves of hindrances to their own development, to take increasing and willing responsibility for the course of their own lives.

But more than this, it is the act of people freeing themselves, choosing to take initiative and responsibility for change and then doing something about it, that is most important. Understood in this way, we can see that the process of development becomes the point of development itself. People are poor not only because they lack capacity, skills and resources – these apparent deficits are also symptoms of their poverty, and if development is only about delivering these, as it is for most instrumentalist development projects, then at best delivery will bring relief and at worse will serve to mask and perpetuate the deeper causes of poverty. People, more often than not, already have enormous capacity in their experience, understanding, knowledge, skills and relationships which are hindered and hidden from use. The poor are generally poor because of inner and outer hindrances to their natural impulse to develop, blockages to what they know and can do. Unless they are free of these, no amount of smartly delivered capacity-building, skills or resources will make any sustainable difference.

Outwardly, people are trapped in unequal social and economic relationships. A focus on removing the outer, more visible, hindrances can help to create conditions of civil, political and economic liberty to free up space and opportunities for people to pursue their own development. This is crucial work, usually the focus of activists and rights-based approaches, but on its own can be insufficient. The deep inner hindrances of poverty and oppression that lie within and between people, are often the most important challenges, and point to a practice of helping people to deal with or to unlearn such things as fear, self-doubt, self-hatred and other deep consequences of deprivation, oppression and abuse. Without letting go of these, no-one can fully deal with outer hindrances.

People need to be free to be creative, to make their own futures. Helping people to be freer in these ways should be seen as both a primary purpose of development and also a condition of continuing healthy development.

The second principle is that development is complex, unpredictable and characterised by crisis

Hindrances to development can be particularly complex, particularly those mentioned that are inner and hidden from consciousness, hidden from other people. There is no straightforward path to dealing with these things. What does it take, and how long, to help a woman in crisis to find her courage to deal with an abusive husband or for a community to find the confidence to deal with

corrupt councillors? When an organisation seems to be on the verge of imploding is this the end or a chance for renewal? Who can guarantee that a community that finds its own voice will stick with the logframe and please the donors? What complex and unanticipated development of forces contributes to a once-flourishing social initiative rolling over and dying? Development is inherently unpredictable and prone to crisis.

Yet almost miraculously, developmental crises are pregnant with opportunities for new movement, for qualitative shifts. Recognising and working with crisis, with all its unpredictabilities, become central to a developmental approach.

This has major significance for practice, requiring a very different orientation to the conventional project-based approaches that insist on steering by predetermined outcomes, which want and then assume an unrealistic degree of predictability, and abhor crisis as failure. Working realistically with human development requires an orientation that understands that "a path is made by walking it", that works flexibly and lightly with plans that are unattached to specific outcomes, that meets each developing situation freshly, in its own right, that welcomes crisis as opportunity for transformation and one that values, above all, learning from experience. Which leads us directly into the next principle.

The third principle is that people's own capacity to learn from experience is the foundation of their knowledge and development

We are what our experience has made us and many if not most of our inner capacities and hindrances come from these experiences and how we have chosen to face them.

Practitioners who like to deliver development as skills and resources, tend to not only ignore the inner hindrances to development that have been learnt from hard experience, but find it difficult to recognise the enormous wealth of experience, knowledge and skills that people unconsciously gather over their lives. Training a group of mothers without surfacing, appreciating and expanding the skills that these same women have already developed, through organising highly complex weddings and funerals, is outrageously common.

Learning from experience is as old as the hills, one of the natural, organic processes, though seldom used consciously, by which people develop themselves. It is so obvious that it is easily disregarded. We learn by doing, by thinking about what we have done and then doing it a bit better next time. We learn from people who show us their experience, connecting it to our own experience.

Action learning is the term we give to a more conscious, disciplined use of the process of learning from experience – in many ways it is a central pillar of our own purpose and approach, both in our fieldwork and for internal development. Practitioners, who use action learning in the field, help people to learn from their own experience, more consciously and collectively, and hopefully in continuously improving virtuous circles. In so doing people can build themselves, their community's or their organisation's ability to act in more sustainable and resourceful ways that are less dependent on outside knowledge or expertise.

What is significant for our exploration here is that knowing how to learn well from own experience, how to observe and remember, to ask the right questions and reflect, how to search for meaning and draw learning and understand what this means for practice, provide the basis for life-long learning and the power to respond to an ever-changing world. A person, community or society that is more confident and competent in their natural ability to learn from own experience will need fewer deliveries of skills and resources from elsewhere.

We need to embed transformation in natural, innate processes and resources like action learning. It is through such processes that development is already happening. Not only is it respectful to work with

what is already there, but it is just simple common sense. The implication for practice, though, is that it takes particular relationships to facilitate this learning and to access what is there, what is latent, relationships that are often quite alien to practitioners who would simply like to efficiently deliver development and move on. That these natural and indigenous processes and resources might be hidden, again points to a primary challenge we face as practitioners – helping people to consciously reveal, appreciate and strengthen their innate capacities and resources of learning. This is a foundation of real independence, inner confidence and sustainability.

(We might want to be careful not to confuse sustainability with longevity, as many tend to do. A developmental approach recognises the need for organic cycles of birth, life and death, each paving the way for the next cycle. Sustaining the life of something as desirable in itself can lead to stagnation, worse than death. Rather, what needs to underpin sustainability are qualities and abilities of leadership, learning, creativity, freedom, mutuality, responsibility, response-ability etc. that enable change to be learned from and worked with, that enable continuous organic development and healthy change.)

Most significantly, the ability to learn well from experience enables us to continuously navigate the crises, the unpredictability and the complexity of development. It is a core process of development and therefore of developmental practice and, like freedom, is both a primary purpose and a condition of continuous healthy development.

The fourth principle is that development is held in relationships

We live, learn and develop within three differently experienced kinds or levels of relationships: relationship with self, interpersonal relationships with people around us and external relationships with the rest of the world. These three levels span the inner and outer experiences of human beings and so it is at these levels of relationships that we find the work of helping people to free themselves. Power is held in relationships, whether it is the struggle we have with ourselves to claim our inner power, or the power we have over others or the power we hold with others, or the power the State wields in relation to its citizens – without relationship power means little, it has no force, for bad or for good. If we want to shift power, we have to shift relationships.

It is within each or all of these three levels of relationships that people are free or unfree. If in our view of ourselves we have self-doubt or self-hatred (not at all uncommon) we become inhibited, entrapped or unfree. A stuck, abusive relationship with a partner may be as great a hindrance to development as a lack of social opportunity or (relationship of) political oppression. These kinds of "unfreedoms" at the three levels of relationship mutually reinforce each other and add up to a recipe for entrenched marginalisation – the core target of development interventions.

In healthy and free personal and interpersonal relationships people are empowered by their own and each other's humanity and are able to learn together, cooperate and provide for their needs to a much greater degree, developing willing and mutual responsibility – even to tackle outer restrictions or oppressive relationships. Simply put, we need healthy relationships through which we can develop ourselves and help each other, again as a primary purpose and as a condition for further healthy development.

Phases of group development

When an individual in the form of a facilitator starts working with a group of people, or in the form of a manager initiates a new approach in a group of subordinates, certain observable behaviours will indicate what is happening in the group. This will happen anywhere a group of people meet in a new situation. There are three aspects in a group process, each having a different emphasis, depending upon whether we are talking about a "study group", a "social group", or a "work group".

a) One talks about a problem, or a topic, which is the content of the discussion.
b) In talking about the subject matter, the discussion goes through a sequence of three stages:
   - Exchanging and gathering of information (orientation stage)
   - Discussing the information, to see which is relevant, etc. and find criteria for the possible solution (opinion-forming/judging stage)
   - Taking the decision on the best solution (decision stage).
   - This pattern is referred to as the procedure of the discussion.
c) In the meeting, the people in the group interact, they talk and listen, participate or withdraw, mediate or quarrel, offer examples or follow the broad line of thought.

In a study group, the emphasis is more on the content, in a social group more on the interaction and in a work group (usually) more on the procedure, although no work group can function well if there is not harmony between the three processes. In fact, in the work group the emphasis lies on different aspects in different stages of the meeting. In the orientation stage, the emphasis lies mostly on the content, in the discussion stage in finding criteria (the process of opinion forming or process of judgment) the emphasis is more on the interaction, and in the decision-making stage, more on the procedure.

First stage: FORMING

A group process starts whenever several people come together in the same place. They meet because they have a certain objective. They intend to be there for one reason or another. These intentions will probably differ from one person to the other. It is also quite normal that some of the members of this group are more conscious of their intentions than others.

It is even possible that people have conscious intentions, but also sub-conscious drives and needs, which will play a part in the meeting, sometimes quite contrary to the conscious intentions. A conscious intention is something you want to do and are aware that you want to do it. You can see the sense in it. It involves thinking. A sub-conscious drive is something you want for yourself. It involves your will and can clash with your thinking, making nonsense of what you say you are trying to do. When a group of people come together, we must realise that each person is sitting with his/her own ideas and notions; feelings, habits and experiences; drives, needs, wishes and motives, some of which are in conflict and not recognised by the individual.

Dependency stage

When the first meeting starts and the situation is a new one, everyone feels very uncertain. The only certainty we have is that we are sitting with other people and that we have experience. Whether this experience will be of any use we cannot say. When we are uncertain we desperately look for comfort. We usually look to the person responsible for the meeting because he or she should know more than the others. So the person with formal authority is the person that should bring structure (certainty) to the group. At this stage the group is very dependent, which is visible in the fact that no one wants to take responsibility.
If we, as facilitators or formal leaders, take on this responsibility, we will prevent the group from

taking responsibility for itself. To enable people to take responsibility we should make clear to the group that whatever happens is also their responsibility. This can be done by giving people as much information as possible, asking questions, asking for the group's opinions to force people to recognise and use their own wealth of experience.

As facilitators we must be serious about this and not play a pretend power sharing game as this will be sensed by the group and have the opposite effect.

Other leaders may for the time being withdraw and "sit on the fence", waiting for "the winner" to become visible. Supporters for one of the parties can become identified in the way proposals of the different parties are supported. Supports are then often emotionally loaded, given in value judgments of pros and cons, mostly made on a subjective basis.

Through this "fight and flight" stage, the first group building process takes place. Then the group breaks into sub-groups. There is also a tendency to challenge the trainer which reveals the in-group versus out-group characteristics of this stage.

What is important through this continuous process of interaction is that although different personal viewpoints emerge, a common objective may become visible. The members of the group then begin to see the sense of the group objective. This gives a vague, sub-conscious feeling of belonging, based on a common awareness of having, for the first time, "met" on an intellectual level. This is based on sharing of ideas, which does not necessarily mean that people agree with one another.

Second stage: STORMING

The members of the group can now start working together. What will now become apparent is the realisation that every individual will express himself of herself in habits, speech mannerisms, and so on. One thinks clearly and formulates ideas well, another is illogical or talks nonsense, one listens seriously and tries to mediate, another is always butting in and aggressively pushing a point.

Everyone has abilities and inabilities. We rarely need to be told our "good points" but we often don't acknowledge our weak area and, when we do, we tend to do so reluctantly. In every human being there is always a battle going on between "in favour of the group objective" (not myself) "in favour of what I want" (myself). There is also the tendency to first see the less attractive qualities of another person. Very often those unattractive qualities we see in others are prominent in ourselves.

Some of these individual traits can aid the group when used appropriately, but they can also prove to be an irritant. When a group of people has to work very closely together, personal points can "get on one's nerves". When a group becomes aware of this they can deal with it in one of two ways:

The emotional solution

- Quarrelling, a tendency to chaos
- Group falls apart into sub groups
- People may walk out
- Group reverts to dependency stage.

The rational solution

- Differences are covered up by procedure:
- "let's not get personal"
- "let's stick to our task"

At this point everything becomes formalised, for example, the need for a chairperson or a scribe. This can become over rigid and overrule personal wishes and desires which do not disappear. It can also

stifle creativity and initiative. Imagine a steam engine here with too much pressure in the boiler. If you open up the safety valve fully, all the pressure blows away at once, but the engine stops working. If you screw down the safety valve and release the pressure in the form of energy, the brakes may not hold, and you will have a runaway train. If the safety valve is opened a bit and the excess energy is guided through normal channels, the train will remain on the track. When the members of the group really become conscious of their problem, want to solve it, and want to do something about it, it is like letting off some steam and keeping the train moving on the track. Here, the members of the group act with inward consciousness and as mature human beings.

A second feeling of belonging can arise. This feeling is based on realising that every human being is different, and that these differences can be a source of creativity for the group. This realisation requires trying to hold back those personal traits that can hinder the group in reaching its objective (sacrificing some of one's personal wishes in favour of the group).

Third stage: NORMING

At this point, a new level of cooperation can arise where every member of the group tries as much as possible to:

- offer his or her abilities in so far they help the group to reach its objective
- hold back those inabilities that hinder the group process
- observe and sense what is going on in the interaction between the members of the group
- use the evaluation method (objectively stating phenomena that happen) to make the group conscious of what is going on
- learn from these evaluations and thus gain self-knowledge
- become a fully responsible group member
- thinking and behaving intelligently to move towards the group objective.

Evaluation is not judging each other but trying to reflect back to the person how she is behaving, leaving the interpretation and judgment to the person. What we can do is to express our own feelings and ask for those of others.

An important feature of this process of evaluating is that people learn serious lessons when they reach conclusions themselves. It may be possible to guide a person toward some self-knowledge by the careful use of questions. However, it is very rare that a person learns by other people telling him what he is like and how he behaves, no matter how good the intentions are. In working together like this, an even stronger feeling of belonging can arise. It is a feeling of belonging which goes beyond personal feelings. It is based on the realisation that individuals in the group all have their personal problems and their individual path of development, which may be quite different from that of others.

This realisation can give us a feeling of responsibility, for the group and for its members, which can result in the question: "What should we (I) do, to help the other individual in the group, to overcome his or her problems and to develop herself further so that she can become an even more valuable member of our group?"

This last feeling of belonging is still very rare in groups. It can be seen in groups which have had to work together over a long period of time. Very often these feelings arise after a group has gone through one or more crises. A crisis where groups have to pull together to survive often leads us to realise that even in our differences our mutual responsibility for each other as human beings is a real source of strength in reaching a group objective.

Mini facilitation briefing

Preparation Guide

We will be using the action learning methodology to practice a developmental approach to facilitation:

a) In your pairs think of the areas in your own practice where you would like to practice bringing a more developmental approach into your facilitation – it could be a meeting, a training session or course, a team building.

b) What is it you would like to highlight or address through your intervention – you may want to see if there is something from your initial questions brought at the beginning. Try to find a topic that is common to both of you or compromise for the sake of this exercise.

c) Now design a 30 minute session where you use an action learning approach, active participation, recognizing past experience of participants, using an experience (simulation, stories, game, creative activity etc.), and then drawing learning from that experience and relate to insights, other theories, concepts and future planning.

d) When you do your mini facilitation remember to take participants through the action learning cycle:
   - Provide an experience
   - Do a reflection using questions to reflect on and analyse the experience
   - Draw learnings
   - Look at how the new insights will be used
   - Be creative, use whatever is available as resources

The roles for the mini-facilitation practice

Who	**Your role is to…**
2 facilitators	The co-facilitation team facilitates a mini-session using the action learning process (see preparation guide)
Participants	As participants, be yourself and participate in the process. Do not role play. Participate as you would in any workshop.
Observers	**Give feedback on the following:** • Use of Action learning approach • Content, process, outcome • Use of resources • The group dynamics • Interaction with the participants • Time management • The outcome …was it achieved? • How the co-facilitation team work together • Habits, gestures, non-verbals
NB: For everyone	Swap roles so that everyone has a chance. Remember not to problem-solve or give advice, unless requested.

Feedback session

After the facilitation practice…. the debriefing starts with the facilitators first asking how it was for them, then the participants (how they experienced the facilitation), then the observers (practicing the feedback guidelines) and then back to the facilitators (how do they feel having heard the feedback).

Remember to use the feedback guidelines and try to give a characterization.
At then end of each round see if there are any general learnings from the process, or anything that can be improved on for the next round.

Developing and working with strategic questions

The First Level: Describing the Issue or Problem

Focus Questions gather information that is already known. When you look at the river, what do you see that concerns you?

Observation Questions: What do you see? What do you read about this situation? What information do you need to gather about this situation?

Analysis Questions (Thinking Questions): What is the relationship of ... to ...? What are the main economic, political, cultural, and social structures that affect this situation?

Feeling Questions: How has this situation affected your body? Your feelings? How has it affected feelings about your family, community, the world?

The Second Level: Strategic Questions....Digging Deeper

Now we start asking questions that increase the motion. The mind takes off, creating new information, synthesizing, moving from what is known to the realm of what could be.

Visioning Questions: Concerned with identifying one's ideals, values, and dreams. How would you like it to be? What is the meaning of this situation in your life?

Change Questions: Address how to get to a more ideal situation. How might changes you would like to see come about? Name as many ways as possible. What are changes you have seen or read about? Here you are trying to find the person's change view, which will greatly impact their strategies for change.

Considering All the Alternatives: What are all the possible ways you could accomplish these changes? How could you reach that goal? What are other ways? What would it take for you to do?

Consider blockages to the will (very NB): What do you still fear? Where are your doubts? What self-doubt do you carry? Is there any resentment or hatred or even self-hatred present?

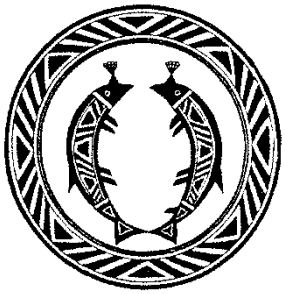
Consider the Consequences: How would your first alternative affect the others in the context? What would be the effect on the environment? What political effect would you anticipate from each alternative?

Consider the Obstacles: What would need to change in order for alternative "a" to be done? What keeps you from doing ...? Decisions become clear around this point. Are you getting a sense of what you want to do? What is in the way of clarity?

Personal Inventory and Support Questions: What support to you need to do ...? What support would you need to work for this change?

Personal Action Questions: Who do you need to talk to about you vision? How can you get others together to work on this?

Surfacing and deepening your burning question – a mirroring exercise



a) Spend a few minutes, individually, thinking of and writing down a burning question that has emerged out of your facilitation practice.

b) Now recall, as vividly as possible, an experience that gave rise to that question… make some notes.

c) Move into pairs or threes, choose someone to begin. She or he should state the question and describe any feelings that accompany it. Then describe, as a vivid story, the experience that gave rise to the question… the sequence, what was said, the people, the place, the mood, how you felt after. Then restate the question.

d) After a pause to collect their thoughts, the listeners should, one by one, reflect back what they thought was happening, what struck them as important or interesting. They could give an image or word picture that characterises the situation. Finish by gently commenting on the question, what you think of it, what strikes you.

e) After a short pause to collect her/his thoughts the teller should **restate or reformulate their question** and then say what **his/her next step** might be towards resolving it.

f) The other one or two now each get their turns to tell.

A Guide to Open Space workshops

By Doug Reeler

Open Space is a conferencing process that operates without a pre-determined agenda. It seeks to maximize participation and minimize input. Capable of incorporating between 15 and 1000 people it is a unique self-managing process that can be used to explore almost any theme. It is best used in situations where there is a need to surface the collective knowledge and experience of participants, to put people into conversations that they have decided are important and to gain their buy-in to a larger process of which it is a part.

Harrison Owen, the developer of Open Space, based this method on two personal observations:

It became clear that the most valuable thing about conferences or large formal gatherings, is less often the formal programme of dry speeches and patchy question and answer sessions, but rather it is what happens in the tea-breaks, lunch-breaks and the after hours get-togethers. This informal, open time, is a space where issues that individuals really feel strongly about can be raised and dealt with amongst similarly interested, though not necessarily like-minded people, who naturally gather together and who want to be there and listen and contribute. This is usually the opposite of the formal programme. Lesson: people are better at raising issues relevant to them than experts, in the time and place of their choosing.

From spending time as a young volunteer in a village amongst the Kpelle people in West Africa he noticed how the people there had developed a social mechanism to deal with village issues, where anyone is free to place in the public forum issues that are urgent or burning for them. A social "market place" of a particular kind then operates which gathers people around those issues and deals with them.

On the basis of these observations, Open Space Conferencing has been developed by Harrison Owen, tried and tested in forums all over the world and has an impressive reputation.

Open Space in brief

Open Space operates on the principle that to gain maximum contribution and commitment, people must be given the free space and time to deal with issues that they feel passionate about and with people who wish to be there with them. It is an open, explorative, brainstorming process. It is not suitable for focusing and decision-making - although certain adaptations can be made to allow for focused mandates to be taken away by groups or individuals.

The essence is this:

- People willingly gather under a broad theme.
- The process could be for ½ a day or for several days, depending on the breadth or complexity of the theme.
- They are given an opportunity in the opening session to put forward topics for discussion under the theme - these are posted onto a big wall into a blank agenda giving them their own time and a place, in a parallel process.
- Once all proposed discussion topics are put up then all people are invited to sign up for the discussions.
- The proposers of the topic must convene the discussion and take notes which are later posted on the wall and/or published for all to read.
- People may move from session to session as they wish.
- After all the sessions there is a reflection, perhaps a discussion about the way forward and a

closure.

- The results of the conversations are then taken forward into other processes in appropriate ways

Detailed process

A typical Open Space would open in the following way:

A major theme must be identified to give some definition to the process. This must be carefully done to ensure a focus that enables the important and pressing issues to be raised. There are no specific guidelines for how this should happen - it could be derived from a number of prior processes, participative or not, depending on what is possible and appropriate.

People should be invited, encouraged, inspired to attend. It is important that all potential participants are considered or given the opportunity to attend because participation can be undermined by the absence of people. However people should not be forced as this would undermine the whole principle of free participation and any coercion would contaminate the process.

No speeches, no agendas, no caucusing, no preparations must happen other than determining the theme, inviting the people and hiring the venue. Any inputs may serve to direct the process and could undermine free participation. If any inputs are deemed absolutely necessary these should occur before Open Space begins and be seen as separate from Open Space.

The venue should have big blank walls. There should be enough space for all participants to sit in a circle or concentric circles and several smaller spaces for small group discussion, depending on the overall group size.

Participants gather, taking their places in the circle(s). The circle is an obvious choice, with no head, no focus but the centre of the circle, which is symbolic of the collective intelligence. In the centre lie sheets of paper and marker pens of some sort.

The facilitator begins the session with introductions, clarifying the major theme and purpose of the conference and spelling out the ground rules and principles. The principles are:

Whenever it starts is the right time

Whoever comes is the right people

Whatever happens is the only thing that could have

When it's over it's over

These are largely philosophical (and quite amusing for most) but are important to clear away preconceptions and any commitments to particular outcomes, apart from those inherently in the major theme. It focuses responsibility on the people attending for the process and the outcomes.

Facilitators then give a potted overview of the process (e.g. how people will put up issues for others to sign up for - the people who put the issues up will be the convenors and are responsible for starting the discussions on time and for taking notes, very important (more detail below).

The "Law of Two Feet" should also be explained here: If in a discussion group you have heard what you want to hear and said what you want to say, you are encouraged to quietly withdraw and become either a Butterfly or a Bumble Bee. A Bumble Bee joins another group, perhaps cross-fertilising it while a Butterfly flits around, possibly the tea-table and joins other Butterflies for informal discussions and are encouraged to note their learnings for everyone else. The Law of Two Feet is an effective antidote to egotists who dominate discussion as people who feel excluded can simply depart, leaving egotists to talk to themselves - or at least get the message.

This opening sets an important tone and must be handled with patience, peace and grace.

The facilitator then invites participants ***who have a burning issue*** they want to be dealt with (under the major theme), to come forward into the centre of the circle and to write up the issues on a sheet of paper and if they would like to, to motivate why they feel it is an issue, or they might ask someone else to do this. It must be an issue that the individual feels strongly about and wants to do something about - not something I put forward because I think it's important for others to discuss. This is the source of responsibility and serious dialogue.

It may appear that asking people to physically come up and to put forward their own issue in front of everyone, is hardly a way to encourage the participation of people who often lack the confidence to participate, but I have been amazed, as have many people, how the process does encourage people to be brave. I have asked several people what it is that distinguishes this process from others in encouraging this coming forward and the replies have spoken about the fact there was no predetermined agenda, that people appear to be genuinely on an equal footing, that the process makes individuals feel very respected. These observations begin to touch on what I would call the essence of Open Space, which will be explored in more depth below.

The issues posted by participants, which will become the basis of group discussions are posted onto the wall into a venue/time grid, created by the facilitators, by the participants themselves.

This process takes between thirty to forty-five minutes.

Once all the issues have been raised and put on the wall, the participants are invited to go to the wall and sign up to participate in any of the discussions (that will be based on the issues posted there). AT THIS POINT THE FACILITATOR MUST WITHDRAW ALMOST COMPLETELY! Yes, get out the way, let chaos happen - it is necessary if you want participants to take control. Perhaps be around to tackle the odd question but don't interfere.

Chaos does ensue as participants are encouraged to sort out clashes and re-adjust the timetable. The chaos here is interesting because it is invariably good-willed, very engaging and somehow works. The person who raised the issue must then convene the group (not necessarily chair it) and is responsible for taking notes of the discussion. THIS MUST HAVE BEEN STRESSED VERY STRONGLY BY THE FACILITATOR BEFORE. The note-taking is critical because it is an important vehicle for sharing the learnings as there are no plenary report-backs.

The group can decide how to run their discussion, large groups may feel the need for a chair, whilst smaller groups may find more natural dialogue, as in informal gatherings, more appropriate.

The sessions are often timed for 1 or 2 hours, with tea being provided on a continuous basis at the marketplace. However participants may choose to extend the discussion at will, except for anyone who has chosen to convene a following discussion.

The convenor, who has been taking notes, must, as soon as there is a space in the programme and with the assistance of any staff on hand, write up or type up and print out their notes and then stick these up on the village market place wall. All participants are then invited to read them and write in any comments they choose to. These comments should be incorporated into the final published proceedings.

At the end as a final session, all participants get together and a resolution session is held - not a plenary, not a report-back - but a symbolic session where any input is entertained and where paths forward may be proposed. This session pulls together the spirit that has developed.

If it can be arranged, each participant should leave the conference with a copy of all the updated proceedings or receive one shortly after.

Some concluding thoughts

My personal experience with Open Space has been that it is a powerful method for opening up participation and have been told by people who normally never speak in meetings or workshops, how they had not only engaged in the discussion groups actively, but had also been bold enough to put forward their own issues as convenors.

Tobin Quereau, has suggested that Open Space is a process that is "open to what emerges from the group rather than attempting to shape the group effort into an outcome that is predetermined...that validates the notion of a systemic *field* of knowledge, energy, and insight which can be accessed when the conditions are appropriate." These conditions are contained in a participative culture that is created in the design and the early unfolding of Open Space. I say early unfolding because responsibility for the process is handed over by the facilitator, after which s/he has a very small role to play until the final symbolic convening.

A critical motivating aspect of Open Space is that it supports and encourages the use of personal choice and interpersonal interaction both in the creation of the agenda and in the choice to attend or disengage from discussion groups (the Law of Two Feet). I suspect that it is because of this respect for personal choice that I witnessed very little "irresponsibility", in other words people using the Law to disengage entirely from the workshop or in any way to disrupt or derail the process. In other types of workshops it may appear that such freedom could lead to chaos but Open Space does show that, if carefully held, it is possible to hand over responsibility for process in a fairly straightforward way. Fully trusting the people and the process is difficult for many leaders or facilitators but is a risk that can be taken with careful design.

I am interested in the chaotic elements of Open Space because it is through the conscious and unconscious use of chaos that many workshops find their creativity. Chaos, the opposite of control, implies a freeing up which participants find attractive and thus workshops often begin with "brainstorming" of some kind, sourcing lateral thinking. What is interesting about Open Space is that so much of the process is chaotic, relying on free association which encourages lateral thinking and engagement throughout. Chaos is also a challenge to participants not only to think as they see fit but also to take personal responsibility.