

Facilitator Development Programme

Background and who should attend

Using **UIMPROVE** Facilitators in meetings and projects dramatically improves productivity and effectiveness, and a strategically deployed pool of Facilitators will have a major impact in an organisation. The aim of this programme is to teach participants the **UIMPROVE** approach to organisational improvement and provide them with the knowledge and skills to facilitate this.

The *Facilitator Development Programme* is specifically designed for people who will have to take up a formal Facilitator role in meetings or projects. It is a 7-day programme in a 3-day + 2-day + 2-day format. The period between each module is roughly 5-6 weeks and this allows participants to gain experience of using what they have learned for real between the modules. Modules 2 and 3 incorporate review and planning for real pieces of work.

The role of Facilitator is usually a 'part-time' activity, taken on in addition to the 'day job'.

Parallel activity

We have found that training up line managers in these skills alongside creating a pool of Facilitators to help them with tricky or complex meetings and projects produces the best results. Courses such as *Universal Improvement Skills* and the *Strategic Improvement Programme* teach line managers to use the skills in their everyday work including meetings and projects and also how to make best use of Facilitators.

Want the skills without the formal role?

Note especially that this programme is only for people who will be able to take on the formal role of Facilitator in addition to their 'day job'. Due to the nature of the content - in particular the requirement to carry out formal facilitation assignments - it is not suitable for people solely looking for a developmental opportunity.

This Briefing Note contains

- The **UIMPROVE** definition of facilitation
- What are the benefits of having a pool of Facilitators?
- What your Facilitators will be able to do
- A brief overview of the programme
- How to select and make best use of your Facilitators

The UIMPROVE definition of facilitation

The **UIMPROVE** definition contrasts with many others that focus on the 'soft' side of group dynamics. Our broadest definition of facilitation comprises three main areas:

- (1) Structure - this means being able to put in place a good structure in a meeting or project to achieve whatever it is a group wants to do. Poor structure makes for poor group working.
- (2) Tools and techniques - this means having a repertoire of alternatives to just sitting around a table talking about things. Lack of tools and techniques also leads to poor group working.
- (3) Group working skills.

We have found that traditional 'facilitation skills' place all the emphasis on group working skills and this is simply not enough. All the best intentions in the world do not lead to change and improvement. What does is having a good structure and a facilitated, participative approach.

We have also found that the traditional approach to facilitation is very reactive - Facilitators turn up on the day, sprinkle some group working magic dust and then disappear. A **UIMPROVE** Facilitator will employ a 'before', 'during' and 'after' approach. Careful planning means that the meeting or project is well structured and suitable tools are identified in advance. Review means that lessons are learned and actions are carried out.

What are the benefits of having a pool of Facilitators?

Strategy

- The resource can be aligned with organisational strategy and focused where the greatest need/return is
- Illustrates top management commitment to improvement

The rate of improvement

- Creates a 'critical mass' for improvement
- Increases organisational capacity and the rate of improvement
- Builds on and supports the work done through other **UIMPROVE** training courses
- An internal resource is better for continuity and follow up

Developing the organisation

- Taps into and develops the talent in the organisation
- Promotes organisational learning
- The skills are developed and retained within the organisation
- Ensures a more structured approach to projects
- Improves meetings
- The skills are transferable to the 'day job'
- Use of the skills is 'contagious' - they will spread through the organisation

What are the benefits of having a pool of Facilitators?

Developing individuals

- Gives individuals a broader view of the organisation through involvement in projects
- Increases job satisfaction
- Today's Facilitators are tomorrow's senior managers and directors

Costs

- Costs less than external provision
- The cost of training is soon recouped in the benefits the resource brings to the organisation

What your Facilitators will be able to do

Facilitate Annual Planning

- Convert organisational strategy into departmental or team objectives
- Identify and prioritise things to be done in the next 12 months
- Produce a departmental or team plan
- Scope and produce a remit for each resulting project

Typically this type of assignment is a one-off activity carried out for a management team on an annual basis

Facilitate project teams

- Identify and follow a project methodology
- Break the project down into component tasks and produce a project plan
- Use tools and techniques
- Ensure balanced participation

Typically this type of assignment is an ongoing commitment for the life of a specific project. This is especially helpful for less experienced Project Leaders and also important or tricky team-based projects

Facilitate a Project Kick-Start

- Get a project off to the best possible start
- Obtain a wide range of involvement
- Use a structured approach and tools and techniques to ensure balanced participation
- Carry out scoping and initial planning
- Get alignment from all involved

A one-off activity for a specific project

Facilitate a Project Refocus

- For projects that have stalled, had a change of leader or reached an important junction
- Obtain a wide range of involvement
- Use a structured approach and tools and techniques to ensure balanced participation

A one-off activity for a specific project

What your Facilitators will be able to do

Facilitate a Project Review

- Use a structured approach and tools and techniques to review and learn lessons from a completed project

A one-off activity for a specific project

Facilitate a Process Analysis Event

- Use a structured approach and analytical tools (specifically an Ishikawa Diagram and Deployment Flowchart) to understand and analyse an existing process

A one-off activity for a specific project

Facilitate a Customer Involvement Event

- This is very similar in format to a Project Kick-Start, the difference being that the participants are customers

A one-off activity for a specific project

Facilitate meetings (regular or one-off)

- Critique and improve an existing meeting
- Help plan the agenda
- Use tools and techniques
- Ensure balanced contribution
- Review

This might be a regular commitment or a one-off piece of work

A brief overview of the programme

Style and structure

What participants learn is practical, tried-and-tested and underpinned by good theory. The programme comprises three interlocking modules. Participants will need to attend the whole programme as the modules are not designed to stand-alone. Within each module there will be a mixture of:

- Input - both educational and skills-based
- Application of the learning to real-life situations
- Learning from what others are doing
- Surgery work - we will use our extensive experience to answer any tricky questions
- Planning and review of real facilitation assignments undertaken between modules

A brief overview of the programme

Module 1 (3-days)

- Understanding the role - what is facilitation, what is a Facilitator?
- Background to the ideas - a brief history of improvement in organisations
- Key Concepts - ideas that underpin the approach
- Tools for Planning and Organising
- Introduction to projects
- The **UIMPROVE** Projects Framework
- Annual Planning
- Project Kick-Starts

Module 2 (2-days)

- Review session - what people have tried since last time
- Effective meetings
- Techniques for Productive Meetings
- Putting structure to a topic
- Tools for Evaluation and Decision-Making
- Making interventions in meetings
- Planning for forthcoming assignments

Module 3 (2-days)

- Review session - what people have tried since last time
- Introduction to processes
- How to improve a process
- Tools for Analysis
- Project Events completed: Project Refocus, Project Review, Process Analysis, Customer Involvement
- Planning for forthcoming assignments
- Review of the programme

How to select and make best use of your Facilitators

Facilitators need to be given time to do the job. For every assignment, a Facilitator will need to hold one or more planning meetings and then carry out the assignment which might be a short meeting, a whole day or a series of meetings. Finally they will need to sit down with the leader to review the piece of work. We recommend therefore that organisations considering training Facilitators should:

- (1) Put in place a formal process to authorise 'time off' to carry out facilitation
This should be 'signed-off' by the Facilitator's immediate line manager and their Director. Depending on the Facilitator's full-time role, arrangements may need to be made to provide cover while they are facilitating.
- (2) Establish a formal process for allocating Facilitators to assignments

See section 36 of *The Complete Guide to Improvement* for the full set of guidelines.