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Introduction

Selecting the right people is critical when creating a pool of Facilitators. The tendency can be to focus on personal attributes, such as people who are outgoing or perhaps people who already run training. This is not the best way to select Facilitators and this section of the manual will assist in the identification of potential people. It may be used as an initial guideline to stimulate ideas on possible candidates or to shortlist people who have volunteered.

Note especially that the training required - the *Facilitator Development 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 just looking for a developmental opportunity.

How many, how quickly?

12 is a good start for any organisation. This is mainly because it's the ideal number to have on the training programme and a good number to have as a coherent group afterwards. Don't consider training any more until either the first 12 are at capacity or your plans require a large number immediately.

Where do Facilitators come from?

Being a Facilitator is not usually a full-time job. The role is best fulfilled by people with potential in line positions from across the organisation on a part-time basis. Potential is the most important word here.

Being selected as a Facilitator is a fantastic developmental opportunity. Experience shows that people who undertake this role increase their skills rapidly. Their facilitation skills combined with an ability to do project work and resulting inter-departmental knowledge of the organisation make them ideal candidates for promotion.

Talent spot or ask for volunteers?

Most organisations choose to pick potential Facilitators rather than advertise for volunteers. This is partly because the role is additional to existing workload, partly because it involves no extra payment but mainly because the managers have had a pretty good idea about the sort of people they have been looking for.

Overall, this is good as it is far better for the senior managers to be directive rather than passive when implementing **UIMPROVE**. However a possible pitfall is that the usual suspects are selected to be Facilitators and the hidden talent remains hidden. Therefore a mixture of 'tapping people on the shoulder' alongside an open invitation is probably best.

The group is more important than the individuals

Although selection of each individual is critical, it is the creation of a group, or more accurately an effective pool, of Facilitators that is the true aim of the selection process. The characteristics of an effective pool include the following:

- A balance across departments
- A mixture of job types
- A few senior people, a few junior people and the rest somewhere in the middle
- A few people (but certainly not the majority) who have done training or facilitation before

The last of these is the least important.

The time commitment

Diary flexibility and an ability to be regularly released from their normal job is key. It is absolutely essential to check that the Facilitator's Director and Line Manager understands this and are prepared to offer their support.

Facilitators must be able to

- (1) Attend the initial training
The Facilitator Development Programme 7 days split over three modules in a 3-day + 2-day + 2-day format spread over a number of months. This will normally be followed by occasional top-up and refresher training and attendance at Facilitator Network meetings.
- (2) Carry out regular assignments
This will include planning and review meetings with the leaders of each piece of work as well as the facilitation itself. Preparation time is also important. A typical assignment will total somewhere in the region of 2-3 days work.

Who should be ruled out?

Anyone unable to be released from their day job should be discounted. Or should they? This is more of a philosophical as opposed to a practical decision for senior managers. If an organisation is serious about adopting **UIMPROVE** and training Facilitators, this activity needs to be resourced properly. This will involve covering people released from their normal job to carry out facilitation assignments and is therefore a resourcing decision.

Personal attributes and behaviours

Unlike the issues outlined above, judging personal attributes and behaviours can be subjective and therefore this must rely on the good judgement of the user. Wherever possible, think what actions might be associated with the attributes below. It may be useful to verify your judgement by asking a colleague whether or not they agree with your opinion. The characteristics have been split into essential and desirable. If the essential characteristics are not met, then the individual should not be selected. The desirable characteristics are icing on the cake.

Essential - The person

- (1) Has demonstrated an interest in their job or the organisation
- (2) Has demonstrated an interest in customer service or improving the job
- (3) Has demonstrated an interest in learning
- (4) Has demonstrated respect for colleagues and their views
- (5) Is articulate
- (6) Is numerate
- (7) Gives adequate preparation to tasks and is generally well organised
- (8) Is not overbearing
- (9) Has the respect of their colleagues

Desirable - The person

- (1) Can stick with a task despite difficulties
- (2) Can understand the contribution of both theory and practice
- (3) Contributes at meetings
- (4) Enjoys a challenge
- (5) Is able to make a point in a constructive manner
- (6) Is prepared to ask for help when they get stuck
- (7) Has the ability to make Presentations
- (8) Has conducted training sessions
- (9) Has been involved in projects

Remember 'desirable' is just that. In the past, the most unassuming man in the world, the most presentation-phobic person in the world and the most junior-of-junior to name but a few have been trained and have become exemplary Facilitators (names available on request). By the way the most junior-of-junior, trained in the late 1990s while on work experience is now a senior manager. Well done Liz.

What not to consider

Do not discount anyone for the following reasons:

- Grade or seniority
- Gender, race, disability
- Current role
- Shift worker
- Not a white-collar worker
- Length of service (short, medium or long)
- Qualifications (lack of or lots of)
- Age

Mistakes to be avoided when selecting Facilitators

It is probably an exaggeration to call these 'common' mistakes as many organisations get their Facilitators selection spot on. However we have seen the following (they are listed in order of frequency of occurrence):

- One or two individuals in the group never get released from the day job to carry out assignments - the commitment required has not been fully understood by the individual or their line manager
- One or two individuals attend for their own personal development and then opt not to carry out any assignments. This is a waste of money and deprives other individuals of places on the training. It is therefore unacceptable.
- Turnover of Facilitators is underestimated. Expect people to be appointed to more senior positions both within and outside the organisation. Even if these are internal moves, it is possible that the individual will find it harder to be released from their day job for facilitation assignments, especially when they are new in post.
- Lack of balance in seniority/experience - the group is all 'senior' or all 'junior'. A good mix is required.

The Facilitator Development Programme

UIMPROVE provides a Facilitator Development Programme. This 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 six 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 of real facilitation assignments undertaken between modules.

Facilitators will be able to undertake all the assignments detailed in the previous section by the end of the programme.

Facilitator Network meetings

We suggest Facilitator Network meetings are held about three or four times a year and should last ½-a-day. They should be led by the Professional Head of Improvement and organised by the **UIMPROVE** Coordinator (see *The Improvement Factory* section of the manual for an explanation of these roles). It is important that individual Facilitators volunteer to run agenda items as on the topics suggested below.

What to do at Facilitator Network meetings

- Start the meeting with a Round Robin flipcharted Briefing of what each individual has been up to (not the 'day job' but facilitation assignments)
- Facilitators to read books about improvement (see the *Support and Resources* section of the manual for suggestions) and provide a Briefing on individual chapters or topics
- Run refreshers on the material covered on the *Facilitator Development Programme*
- Watch videos followed by Pairwork on learning points
- Practice tools and techniques
- Briefings or Presentations about any training or conference individuals may have attended
- Briefings on any interesting assignments that individuals have carried out (in much more detail than the Round Robin overview at the start of the meeting)
- Surgery session - Individual Facilitators carry out a Briefing about a forthcoming tricky assignment. This is followed by Pairwork or Small Group Work to bring the group brain to bear.

Next steps for Facilitators

As Facilitators

The immediate next step for successful Facilitators is to broaden their repertoire by training them in **UIMPROVE**'s portfolio of teamworking assignments - Team Events, Interface Events, Departmental Events and so on. Experience suggests that, of an initial group of 12 Facilitators, a maximum of 6 will ever get this far. Therefore this is a step to be taken some way into the adoption of **UIMPROVE**.

Larger organisations should consider taking a UIMPROVE Licence and running their own training in-house. Courses such as *Improve Your Projects* and *Universal Improvement Skills* have been successfully run by Facilitators with minimal extra training.

Next steps for Facilitators

Career

Today's Facilitators are tomorrow's Chief Executives. The reason for this is threefold:

- (1) The structural skills gained such as corporate planning, project methodologies, tools and techniques are extremely useful (and often lacking) at a senior level
- (2) So is the ability to work with groups and obtain balanced participation from all
- (3) Facilitation of a range of projects means that Facilitators are unique in organisations in that they have an overview and understanding of many different teams and departments, projects and processes.

Allocating Facilitators to assignments

The allocation of Facilitators to assignments is a job for the UIMPROVE Coordinator.

Maintain a list of Facilitators. As requests for Facilitators are received, allocate the assignment to the first free Facilitator on the list. Any cases of Facilitators being unable to undertake an assignment should be recorded to see if there are any issues about them being released for this activity.

Note especially that caution should be exercised when allocating very junior or inexperienced Facilitators to high profile assignments with senior managers. It is best to double them up with someone more senior and experienced (even if the more experienced person acts as Second Facilitator).

Corporate level projects take priority. Once the availability of Facilitators starts to get tight, consider training a second tranche. Good record keeping is essential for this to show that good value is being achieved from the existing pool.

Common pitfalls

- No formal process for allocating Facilitators to assignments, people ring up their favourites instead
- A favourite few Facilitators get used for the majority of assignments
- Each department uses their own Facilitators rather than the pool being shared across the organisation
- No strategic deployment based on corporate priorities, first come, first served instead

Record keeping

Record keeping is another job for the **UIMPROVE** Coordinator.

We suggest the following should be reported quarterly and annually (or other period if more appropriate for your organisation). A summary report should be made by the Professional Head of Improvement to the Senior Management Team and each management team concerned.

For each Facilitator

- Number and type of assignment and whether as Lead or Second Facilitator

For the pool of Facilitators

- Total number of assignments carried out broken down by type
Note, if Facilitators double up for an assignment, this counts as one

For each management team

- Number and type of assignment facilitated on their behalf
- For each, title, Champion, Project Leader

This information should be recorded in the form of a summary report for the whole organisation so that comparisons can be made between teams and departments.

For each Project Event

- Number and names of attendees

This information should be distilled into:

- (1) Number of individuals who have been directly involved
Calculate this as a figure and as a percentage of the organisation - bear in mind, if one individual attends ten Project Events, this counts as one person for this. They may have 20 colleagues, none of whom have been involved.
- (2) Total number of 'attendances'
Calculate this as a figure. In this case, if one individual attends ten Project Events, this counts as 10 attendances.