Culminating Facilitation Project:
Final Report

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At the beginning of the semester, I quickly engaged with a potential client whose timeline did not meet the project deadlines. This experience served as a reminder that only some clients' needs can be solved in a consulting paradigm. After shifting focus from the original client to ███████████████████, everything began to fall into place. Due to career changes, it had been over a year since I facilitated training or consulting events, but I have been facilitating meetings for my team at work. The opportunity to work with ████ fulfilled the need to apply the concepts and methods learned in the course and provided a chance to serve the community at large.

Create Collaborative Relationships

The administrator at the center understands the methods and techniques used in the process, which helped drive a rapidly formed partnership. The center administrator started her role four days before agreeing to engage in the project. Her ability to lead by gaining trust and exuding positivity fostered a supportive environment for the work. The center, facing many issues, including low enrollment and lack of funding, was scheduled to undergo accreditation and charter renewal in less than one month. Since this situation presented a volatile, uncertain, complex, and ambiguous scenario, it seemed a perfect fit.

Fortunately, not only do the administrator and I know each other well from the book club, but our work styles are very similar. Because the challenges presented a dynamic degree of possibilities, the project's scope and focus continued to evolve throughout the work. The original plan of three meetings became four meetings. Scope creep could have been avoided with better planning, which will be discussed later in this paper. I am grateful for the client's willingness to take my lead and not react negatively to the addition of the fourth meeting.

During the discovery meeting with the client, she wanted the project's purpose to be conducting studies on the faltering programs and student enrollment. She accepted my advice that not only would the project's scope, in addition to my work schedule, not make that possible, but that we needed first to decide how to approach the analysis and what role everyone would take in gathering the data which resulted in the eventual outcome in the form of an action plan. From then on, the client allowed me to try anything I suggested. This is not to say that they relinquished control, but trust continued to grow after experiencing results from each meeting. During the space between meetings, the stakeholders expressed appreciation for how the leadership team processed hard questions without hard feelings.

In some respects, the leadership group at ██ represents what Amy Edmondson calls Teaming. (TED, 2017) The administrator started the job only a few days before the project began, and several new staff members, representing multiple roles, were also part of the committee. They know the center faces possible closure and at least corrective action from the district. They unified over a collective desire to preserve the center's contribution to the marginalized community it serves. Multiple times during the project, someone in the group voiced concerns about dire consequences. I recognized the need to facilitate group self-awareness about their abilities to conquer obstacles. While preparing for each meeting, designing inspirational questions to help them aspire to greatness felt critical to the project's success.

Plan Appropriate Group Processes

The original plan consisted of three meetings with the client. The initial meeting served as an opportunity to build relationships with the client, outline the three meetings' purpose and process, and gather their input about the current gaps in the programs and enrollment. As stated in *The Fearless Organization*, "In a VUCA world, high performance occurs when people are

actively learning as they go." (Edmondson, 2019 pg. 18) It felt appropriate to help the leadership team members do the work and learn the process of Focused Conversations for future endeavors. Throughout the process, the plan intentionally included providing them with resources and tools to support this goal. The group not only appreciated this gesture, but trust in their abilities also grew.

The blend of tenured and new employees on the leadership team allowed a design opportunity for the first meeting to include questions about the center's history. The tenured staff shined as they explained the origin story to the group. This also provided the opportunity to see different personalities and the roles everyone takes in the group, further supporting the competency of creating collaborative relationships. The overarching goal of the first meeting centered on deciding what programs to evaluate and how to evaluate them. At some moments in the first meeting and after, it felt like we were moving afield from that purpose. Each of the meetings contained some aspect of review and evaluation. In retrospect, it would have been better for the first meeting only to be a review. This allows more people to think aloud and share and not feel rushed by the goal of what the data may be telling us.

The focus of the second meeting centered on a formal SOAR embedded into the Focused Conversation Template outline. During the Interpretative phase, the design included an activity dividing the participants into two equal groups. One group focused on the medical programs at the center, and the other focused on the manufacturing programs. Group activities help mitigate the issues with participants who hold back, share, and over-share. Groups can discuss their data in smaller settings to expedite the discussions and allow the participants to guide each other in dialogue. It felt prudent to provide an avenue for active social therapy as put forth by Patrick de Mare and David Bohm. (Stanfield, 2000)

Ultimately, these goals and keeping to the original outline of three meetings could have been accomplished by moving into the Accelerated Action Planning in the second meeting. One area of opportunity for me for this project revolved around planning. Prepping for the Accelerated Action Plan after the second meeting revealed that the SWOT in the AAP would be redundant to the SOAR. After making this realization, it seemed it would work favorably and allow for the Accelerated Action Plan's current reality (strengths, weaknesses, benefits, dangers) portion to be expedited. The third meeting landed two weeks after the second meeting, and during the space in between, the leadership committee went through accreditation and charter review. Printing out the notes from the SOAR would have been helpful for the group, but even with notes, they had lost some of the connection to the data.

Each group, like each person, is a unique experience. My heart keeps telling me this group would have benefited from going through the entire Accelerated Action Plan in one three-hour meeting, not two 90-minute sessions. Perhaps this is only my desire to try it this way, but protected and purposeful time gives any project an elevated status, which serves the goal with respect. After each meeting, the administrator appreciated how the meetings produced the space for the team to do the work. They accomplished in four meetings what otherwise might have been six months of work for the leadership team. The project allowed her to unload part of the burden of demanding shifts and drastic change immediately after starting the role. We all witnessed the group taking ownership, and even with the shortcomings of the project plans, they were empowered and ready to take on daunting tasks.

Over the last two decades, I have worked predominately through the guidelines of using a traditional run of the show, module planning worksheets, and experiential learning cycle question guides. I enjoyed learning new tools and techniques to put into my facilitation toolkit and have

already implemented them at work. After being asked to be a keynote speaker at an event, the facilitation planner allowed a simple format to brief the event organizers on my content and the resources needed. Another upcoming work project will be conducting a SOAR; for this, an ORID format in the Focused Conversation template will be perfect. I appreciate how similar ORID feels to GROW, which has always been my favorite coaching format.

The reading from the *Skilled Facilitator* provided much information for reflection. When discussing this reading with other cohort members, many said the section was accessible. Interestingly, I had to read and re-read this section and will probably continue to do so. It challenged me because I did not agree with everything put forth. It seemed simple for the sake of providing clarification and guardrails. (Schwarz, 2016) Facilitation is complex, and it will never be simple when done well. Most of my facilitative career revolves around Facilitative Trainer and Facilitative Leader. For the experience with ███████████, the role shifted fluidly from Facilitator to Facilitative Consultant.

Create and Sustain a Participatory Environment

My years in facilitative training and facilitative leadership benefited the use of presentation skills, group management, and asking questions. Another skill that helps me build credibility revolves around referencing participants' previous comments or questions later in the event or at the next event using what Marshak refers to as deep listening. (Marshak, 2004) This ability to be present with the group and form a strong memory of what happened or what was said serves me well in helping groups evoke awareness or facilitate growth. Facilitative training includes course correction, as does facilitative consulting. During the project, I sometimes questioned whether my role had been established enough with the group, and course correction or evoking awareness seemed to overstep our agreements. In retrospect, the group viewed me

more as a facilitative consultant than a facilitator, and more course correction would have been appropriate.

For each meeting, the facilitation plan included warm-ups or icebreakers to allow participants to transition from morning traffic to brainstorming-centered tasks. Sessions two, three, and four all had a breakout or small group activities, which allowed the participants more ownership of the process and where the magic happens. Both the icebreakers and activities delivered on the planning expectations I had for them. The Accelerated Action Plan brought several challenges to me as a facilitator, including the previously mentioned areas of planning and breaking it into two meetings. Even though I prepped for the AAP meetings, seeing the group take over and lead themselves through the work was a surprise.

Other aspects of the plan that could have gone better include some of the questions on data and analysis. Surprisingly, only a few individuals stated they had participated in any program studies, root cause analysis, or research topics for higher education. Educators made up the dominant membership of the leadership committee, so this was unexpected. Because this client started the work a few weeks into the semester and their accreditation and review meetings

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Other skills and habits gained from the trainer or leadership style of facilitation hindered this project. For example, I frequently acknowledge learners' responses with "good answer" or "that's interesting," especially if nothing comes to mind to ask as a follow-up question. Both responses create a non-neutral tone and risk when you favor some responses over others. Additionally, a typical facilitative training event lasts 2 to 8 hours. Shifting to a short 90-minute block of time brought challenges with follow-up questions and managing comments from a few participants. It will be essential to gain a feeling for the natural rhythm of the shorter time frames since timekeeping impacts facilitator credibility.

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with the school district took precedence, I avoided pressing the stakeholder for more time in the discovery phase.

This project would have benefited from two discovery meetings and an on-site visit before the first meeting. The rushed discovery phase cost time in the event meetings, which could have been avoided with better planning. For example, awareness of who in the group leans toward dominating the conversation or helping the administrator narrow the project's scope. The current trend of enablement learning in adult education creates what some refer to as snack-bite learning. Similarly, in VUCA environments, taking the process to a smaller scope can help the participants avoid feeling overwhelmed. Ultimately, most people lack the disposable time to sit in lengthy meetings.

Surprisingly, only one moment stood out as contentious and difficult to navigate. Near the end of meeting three, the group came to an impasse during the Commitment phase of the Accelerated Action Plan. The lone dissenter in the group insisted on including language to showcase or honor the past learning experiences of the center's prospective students. No one else spoke up to support or debate her opinion. I strongly reacted to her insistence but kept quiet to make space for the group's wisdom. A long pause ensued while my mindset shifted to its default setting, and I minimized expressions. (Schwarz, 2016) After no one spoke up, I shifted gears and asked the group to let this rest till our next meeting since it was time to adjourn. This individual did not attend the final meeting, leaving me to wonder what she sensed from the group or me during the previous meeting. During the fourth meeting, the group abandoned discussing her ideas.

The room contained one large conference table surrounded by oversized office chairs and additional chairs crammed around the outside walls. The counter space included a coffee bar and

snacks. One sizeable whiteboard filled the space of an expansive wall, and at the end of the room, another fold-out whiteboard anchored the front wall. These elements helped create a literal and figurative space for facilitating processes. Unfortunately, approximately 50 computer hard drives stacked at the entry side of the table during the second meeting limited movement in the room. However, I took flowers or fruits from my garden for each event.

Guide Group to Appropriate and Useful Outcomes

Sometimes, it felt like the work meandered and needed more proper focus. The group seemed far away from the scope during meeting one and, to some degree, throughout all the meetings. On the other hand, they were wholly committed to the work when they laid out the project activities, first step, timeline and milestones, budget, and victory. Since the first meeting, they have asked when this phase would happen. Seeing them focused and intent on completing this made me happy for them. There was no pride stemming from a sense of helping them do the work. They did the work I was just a guide.

My original mentor in facilitative practices always referred to facilitators as sherpas. I refer to my work as being akin to a river guide. Facilitators carry the significant weight or the pieces for the group. As mentioned, tying back to what participants said earlier in an event or at another event builds credibility, but another benefit is the movement into group reflexivity. The meta moment, where they hold the same thought simultaneously, helps facilitate change in homeopathic doses.

Build and Maintain Professional Knowledge

Even though I have previous experience in various types of facilitation and was familiar with the Technology of Participation, psychological safety, and VUCA, this was my first time taking all three of these elements into a project. I am grateful for the opportunity to work through

these concepts in a mindful way, which ultimately aided the client in finding beneficial outcomes

for dire challenges. After being eliminated by ███████, I discovered Accelerated Action

Planning on a consultant's website. Typically, I advise facilitators to deliver content three times

before they start changing it. Even though I alluded to making changes in previous comments,

sticking with that adage will allow me to know what can be more effective.

Reflecting on what I entered into with the client, outlined, planned, and ultimately delivered, I

realized it changed throughout the project. Fortunately, though, following up after events and

staying in communication in the space in between meetings helped bring the project to a

beneficial space for the client. They want the University of the Pacific "to sign them up for all

the free consulting they can get." As a long-time coach, trainer, and facilitator, I emphasize Level

4 evaluations more than Level 1. Reaching out to the team at ██████████ at the three- and

six-month mark will be the true measure of results.

The prospect of continuing to deepen the lessons from this semester and engage in the

discovery of new studies a welcome challenge. Reflecting on the needs of a client does not end

when they arrive at an outcome; frequently, the lessons learned from one client stream into

another. I strive to be in service to others as a facilitator and not a sage on the stage. After years

in front of groups, moving them through space, this experience has reminded me how precious

this work is and how much I have missed it. Learning new techniques, establishing relationships

with clients, and leaning into their needs help me stay in service to others, which I enjoy.

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