

Stretch Group Facilitation Summary: A Case Study Overview

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After I tape up the last poster, shove the last chair into place, and put the last of the markers out on the tables, I look around the deserted room. Like me, it's full of possibilities, simply waiting for the people to arrive. I've experienced this moment—the quiet time before a facilitation—scores of times thanks to this class. At first, I simply thought of it as the calm before the brainstorming. Now, I've come to welcome it as a last chance to complete a mental checklist, to make myself as ready as possible for the session to come. Given the last few weeks, I know it's the instant when planning shifts to reality.

That's just one way this stretch group facilitation practice has changed me. There are others, too. I have learned it's best for me to stay in the process and out of the content; the process works better that way. Experience has also given me more facility in reading a room and sensing where a group's attention and energy are at a particular point in time. And in working past my initial awkwardness with Creative Problem Solving (CPS), I'm now in thrall to its power. Time after time, I've watched it foster collaboration and help groups—and the people within them—discover new directions.

At the same time, I felt challenged to discover new directions myself throughout my stretch practice. Occasionally, I thought to myself one of the most creative aspects of this assignment was simply lining up clients. But as I persisted, I found creativity in almost every aspect of this work. The more sessions I facilitated, the more I likened the process to making art: I might have an idea in my mind, but the mash-up of my skills and the process meant that something different—and often surprisingly fine—would result instead. That was true in each of the case studies that follow.

CPS Case Study Number 1: A College Retirement Seminar

In early January, I was contacted by Gerriann, the owner of a career counseling firm, to help facilitate a daylong seminar for perspective retirees at the university. We designed the session, guided by an outline for a retirement seminar Gerriann was already accredited in. Some 40 people signed up, and we discussed how to engage a group that large. We determined I would assist Gerriann and the other presenters as they conducted their portions of the agenda. In turn, I was to deliver a one-hour talk on wellness, based on my experience as editor of *Cooking Light* magazine. I would also facilitate an hour-long exercise to conclude the session. For that, I adapted an activity from *Orchestrating Collaboration at Work* by Arthur B. VanGundy and Linda Naiman. The activity, "Restrictions and Limitations," required the participants to work with red, blue, black, and yellow paint to create as many colors as possible in 15 minutes. The debriefing was to focus on how participants might overcome their own limits to create the fullest retirement possible.

I spent about 20 hours preparing for the day, including the initial meeting, writing my remarks, preparing welcome packets, visiting the space before the meeting, and buying supplies for the painting exercise. I worked eight hours the day of the seminar, two of which were my facilitations. I met with Gerriann and the other presenters the following week for about an hour and a half for our own debriefing, using the feedback forms from the participants. They rated the seminar good, but not great.

This was a stretch group for me because it was the first time I'd worked with this partner. I found it frankly takes some experience to understand how to best work with someone new. More to the point, however, it would have been a stretch quite simply because of the size and diversity of a group whose members ranged from technical support staff to internationally-known biomedical researchers.

Perhaps because of that diversity, what I specifically learned was that leading a large group really requires a commitment to be in the moment. During the wellness presentation, for example, I was aware that some of the group was engaged, and others weren't. But because we had constructed an ambitious agenda, I had to press on with the process regardless. I was able to solicit response by asking direct questions, but it felt flat.

Case Study Number 2: Another College Retirement Seminar

About a month later, Gerriann hired me for a second session, again for about 40 people. As we planned this seminar, I shared with her the gist of my readings in *Accelerating Learning* by Dave Meier. We agreed I would redesign my wellness talk with them in mind, and restructure the capstone exercise so it was not at the end of the session. With more time on the agenda, I could make sure we had time for meaningful debriefings.

I spent roughly another 12 hours preparing for this day, including the pre-workshop meeting, writing my new remarks, preparing welcome packets, and augmenting supplies for the capstone exercise. Again, I worked eight hours the day of the seminar; two of those were spent leading activities. Then I met with Gerriann and the other presenters the following week for about an hour and a half for our own debrief, using the feedback forms from the participants. This time, the participants gave us a top rating.

This was a stretch group for me because it tested the principles I'd learned in this class. I considered scrapping my earlier presentations a necessary experiment to test the effectiveness of Accelerated Learning.

Specifically, my chief learning was that the principles of Accelerated Learning work. My revamped wellness talk included a hands-on workout, a recipe, and meditation technique. As I began, I handed out freshly cut orange segments for a slight fragrance change (and to raise the point that wellness is directly related to food).

I started the session with goals and objectives, and at the end got the attendees to commit to sharing at least one of the things they'd learned with someone they cared about before the end of the next day. The level of engagement in this group (which was possibly more diverse than the first) was noticeably higher. My workshops drew applause. Gerriann was so taken by the change that she bought her own copy of *Accelerated Learning*. As for the capstone project, the experience of having the participants frame in their own words how painting related to the restrictions and limitations they would face in retirement was more resonant than I could have imagined.

Case Study Number 3: Organizing an Art Gallery

One of my safe group facilitations was at an art gallery in Birmingham, and one of the co-owners, Dori, asked if I could facilitate a follow-up session dedicated to helping her determine how to organize her office. I'd just read a chapter in Roger Schwarz's book, *The Skilled Facilitator*, which inspired me to draft my own client questionnaire. At our first meeting for this session, Dori thoroughly answered all the questions. I wrote up our interview and shared the document with her. We decided to focus the session on specific products and furniture she would need to organize and update the gallery's office. That was at the Transformation stage of CPS. As an aside, she remarked that she found facilitation sessions rewarding because they gave her a plan of action, and was looking forward to having one at the end of this session. I tried to manage her expectations, yet her remark stuck with me as I planned the facilitation.

The day of the session, I set up the gallery before Dori and the four resource group members arrived. We undertook Exploring Ideas with Stick 'Em Up Brainstorming and Formulated Solutions with Hits and Highlighting, and Action Steps. Dori committed to doing online price comparisons in the next 24 hours, and one of the resource group members committed to giving an unused desk to the gallery.

I spent about five hours preparing for this facilitation, including the interview and redaction, as well as shopping for needed supplies and snacks, and setting up. The session lasted over two hours—the participants said they so enjoyed the process they didn't want to leave. So I involved them in a more lengthy debriefing process, asking open-ended questions in a round-robin format. That and a follow up with Dori a week later took another hour.

This was a stretch group for me because it involved taking what I was learning and directly applying it to a client I'd facilitated with before. It involved managing her expectations, as well as those in the resource group, two of whom had earlier been in facilitation sessions with me. In my follow-up meeting, Dori expressed how committing to a plan of action within 24 hours was key to her—she felt responsible to me and

the resource group. And sitting in her reorganized, remodeled office two weeks later, I was pleased we helped her take the critical first step forward.

Specifically, I learned that in working with an ongoing client, managing expectations is an ongoing task. Despite telling her that the second session might not yield the same results as the first, Dori was certain she would emerge with a plan of action. Fortunately, that happened in this case. And as we've continued to work together, she agrees that every facilitation session is unique.

Case Study Number 4: Assessment Debriefs at a Boutique

In late March, I took a two-day training workshop and became certified in administering FourSight, the thinking skills assessment. For my first post-training debrief, I turned to the owners of a men's- and women's-wear store. After I described FourSight to them, talked about their challenges, and outlined its potential benefits to them, they agreed to have their three-person team take the assessment. We reviewed the results one evening after work at the store.

I shared with them the existing PowerPoint presentation on FourSight, and had them estimate their preferences in a card sort exercise. It turned out their assessments were close, but not exactly like their voiced preferences. There was one Integrator, one Analyst, and one Driver. The Analyst and the Driver said they actually work well together, and remarked that they made an "argyle," an apt pattern for a high-fashion business. In discussing the interplay of profiles, the team acknowledged that they work well together, and said that knowing their preferences gave them a sense of solidarity. "The three of us have every base covered," the Integrator said. Distilling their key learnings, they said that understanding their preferences meant they could collaborate with greater appreciation of their individual strengths. In an informal follow-up meeting two weeks later, the three were still using the language of FourSight in talking about work.

I spent two eight-hour days in the FourSight training—plus another day for travel to and from Chicago. It took another three hours to discuss the background of the measure and attend to the paperwork necessary for the session. The actual presentation and debrief took an hour and a half; the follow-up was another 30 minutes.

This was a stretch assignment for me because it was the first independent assessment I debriefed. It marked the start of yet another learning curve.

Specifically, I learned that by taking my time, and proceeding step by step, the process would take care of itself. In the follow-up conversation, it also occurred to me that my lack of experience with the group

debriefing process might have been an asset: I took pains to be clear and specific, and the store owners later mentioned how much they appreciated that.

Case Study Number 5: Creativity Block Workshop

Reflecting on a CRS 559 paper I wrote about facilitating creative block, I designed a workshop aimed at unblocking stalled artists and writers. I created a video and lesson plan that featured tools for each stage of creative problem solving.

To test the response to my design, I invited four graduate students at the University of Alabama-Birmingham who were in various stages of writing their theses. We began with an exercise from the VanGundy-Naiman book that required the participants to mimic each other, and during the debriefing discussed simultaneous means of communication. As we progressed through the workshop, we covered the basics of CPS and I taught the participants the Ladder of Abstraction, Forced Connections, SCAMPER, and PPCo. Actually, the Ladder of Abstraction was so popular, we did it twice.

While the participants were working on tools, I had them draw/doodle with markers, crayons, and pastels on paper I'd covered the table with—another VanGundy and Naiman exercise. After tool practice, I set the timer for five minutes and had them make up a problem-solving fable based on their doodles. They rose to the assignment, incorporating a four-leaf clover, Whistler's Mother, the Ladder of Abstraction, rainbows, and Beethoven's Ode to Joy.

During our debriefing, all the participants agreed the drawing/fable was the part of the workshop they liked most. Because it obliquely related to their theses, it refreshed them. Practicing the tools gave each participant direction for what to do when they get back to writing. Checking in with them a week later, they'd all taken some action, and independently used the tool sheets from the packets I'd prepared for them.

I spent about 15 hours designing the workshop, producing the video, recruiting and inviting participants, securing a location, preparing participant packets, setting up, taking down, and following up. The session itself lasted two hours.

This was a stretch assignment for me because I was responsible for everything from creating content to identifying and recruiting the attendees to teaching them. In effect, it was a completely homegrown effort.

Specifically, the assignment taught me that there is joy for all concerned when the process really works, as it did in the final exercise. There was some suspense as I wondered if they'd actually create their fable in the allotted time. In short order, that was replaced by the giddiness that suffused the room when they did.

Case Study Number 6: FourSight Group Debrief at an Art Gallery

As a part of my ongoing facilitations with Dori and Scott, the owners of the teaching studio and art gallery I'd worked with earlier, I arranged for them and their three-person management team to take FourSight. During a staff meeting at the studio, I led them through a presentation about thinking styles. Because they were familiar with the measure, they'd already self-selected their preferences. More than anything, they were interested to see confirmation.

The team consisted of one Implementer, one Integrator, two Ideators, and a Driver. The low preference across the board was for Clarification. We discussed the dynamics that resulted from those profiles—the Integrator said he often felt he was viewed as a naysayer because he needed to ask questions at critical points during projects the gallery undertook. There was an illuminating moment when the other team members began to view his questions not as impediments but as necessary steps. During the debriefing, Dori said understanding the specifics of her profile—and those of the rest of the group—would help her short-circuit unnecessary conflict. “It actually changes my perspective about how we can work together,” she said.

I spent about four hours organizing this staff meeting, including arranging for the assessments, confirming that the principals had taken it, and planning the session. Another two hours were spent in the facilitation and debrief.

This was a stretch assignment for me because the clients had some familiarity with FourSight; until I had their assessments and began planning how I'd discuss their group's dynamics, I wondered if I would simply be repeating their assumed preferences. I needn't have worried.

Specifically, I learned from this session that there is satisfaction in continuing to work with particular clients. It offers layers of complexity that don't necessarily appear when you engage with clients only sporadically. I hold close a sense of context that incorporates all we've done before—and the possibilities of what we might do in the future.

Case Study Number 7: Conference Facilitation

Scott, the other principal at the gallery, was named director of a 2012 statewide conference for pottery students, teachers, and artists. About 500 attendees are expected, and the state agency funding the event has expressed interest in keeping the conference in Birmingham under Scott's direction if it goes well. "When I began to think about the situation, the first thing I thought was, 'We need a problem-solving session'," Scott told me.

He asked me to join him at a two-hour-long preliminary meeting with the liaison from the funding agency, as well as a pottery professor who'd successfully led an earlier conference, and six artists who volunteered to chair committees for the Birmingham conference. Perhaps because he knew I'd had this background, it was later hard to pin Scott down on specifics for the facilitation session beyond place and time. And even those specifics changed when severe weather forced us to postpone our session for 48 hours. Not everyone who agreed to be at the originally scheduled meeting could attend this new one, but we proceeded with Scott as the client and four committee chairs as the resource group.

Before the session, I devised flip chart pages with the background I'd gotten in the meeting, and others that delineated CPS stages. I decided we would start at the Exploring the Vision stage of clarification. At the meeting, I asked Scott to relay the key data. We determined that the session would outline the duties and goals for each of the eight committees. Scott and the group started Formulating the Challenge, "What might be all the duties and responsibilities for this committee?" The group diverged with BrainWriting. They converged by having Scott and one of the resource group members select Hits and Highlights for each of the committee duties. Afterward, they drew Mind Maps to reiterate where the committee duties would intersect in the course of putting together the conference. The final step was to help Scott devise action items for the conference for the next two weeks. The list included sending inviting the committee chairs to a meeting in which they'll receive their assignments—and their duties. When I followed up the following week, Scott had set up the meeting and said the meeting had helped him see how the various groups would work together to make the conference happen.

I spent about five hours preparing for this evening, counting the preliminary meeting, shopping for snacks and drinks, writing the flip charts, and setting up the room before the session began. The session was about two hours long; the follow-up, about 30 minutes.

This was a stretch assignment for me because the problem was ill-defined. Moreover, I wasn't able to conduct a complete a client interview. Perhaps because I've worked with the client for several years, the session fell into place better than it might have. But that was just luck. I've already been asked to facilitate the next meeting, and will be better prepared. The group will be better off because of it.

Specifically, I learned that CPS is adaptable. However, it isn't magic, and as a facilitator, I learned that I push its limits at my peril. This experience reminded me that there's no substitute for one-on-one dialog with a client, and that I shouldn't agree to go forward until that requirement has been met.

Case Study Number 8: Integrative Medicine Exploratory Committee

Four years ago Cullen established a cross-divisional group at the university to discuss alternative and integrative medicine. Due to other obligations, the group has been on hiatus for 18 months. After informally polling former members, Cullen decided to reconstitute the group. He and I conducted a client interview lasting about two hours, yielding substantial key data for the Exploring the Vision goal statement: "It would be great if we clarify a common purpose—a mission, if you will—for this integrative medicine resource group."

Cullen scheduled a lunch session, which was ideal because three of the invitees were physicians, and a working lunch was the only time they could meet. In fact, that I was facilitating the meeting was played up in the invitation—the attendees were promised that we would start and end on time. It did incentivize response; two physicians, two sociologists, and a medical historian were able to attend. While they worked on their sandwiches, I began the session with introductions, instructions, and Cullen covered the key data. Using Statement Starters, the group began to formulate a host of problem statements. They selected the most potent ones, and merged two to come up with: "What might be all the ways this group could leverage our limited time and thriving interest in integrative medicine to be meaningful to UAB and the community at large?"

At the halfway point, the group seized on a new direction. They agreed to establish a steering committee to identify key stakeholders who would determine the organization-wide interest in a larger, more meaningful collaboration between UAB and the community of integrative medicine providers. I guided them toward a brainstorming session identifying who would be useful on this committee; working in concert, they identified 20 potential members they agreed to contact. We used the remaining time to group-draft goals for the committee. I wrapped up the session with an action plan that included a 24-hour deadline for drafting the invitation to the potential committee members, and next steps for this Integrative Medicine Exploratory Committee.

I spent about six hours preparing for this meeting, including the client interview, shopping for lunch, preparing flip charts, and setting up the conference room. The facilitation lasted a scant 90 minutes, the outer limit for midday meetings involving medical staff. A follow-up conversation lasted another 30 minutes.

This was a stretch assignment for me because it involved a highly educated technical audience. It inspired me to introduce the scientific background of CPS when I taught the process to the group.

Specifically, I learned my role as a facilitator is sometimes to simply keep the energy moving. Adhering to the schedule made me feel a bit breathless at times, but the attendees seemed grateful. In retrospect, consensus helped us stay on time. During the debriefing, Cullen said this meeting had accomplished more than the previous half-dozen had, and several members added they were favorably impressed by the power of CPS as a means to an end.

Case Study Number 9: FourSight Facilitation at a Day Spa

Tammy asked me talk about FourSight at a morning staff meeting at the day spa she manages. We agreed I would talk to the six-person senior team about using it as a means to understanding self, colleagues, and clients. Relying again on the instructions of Accelerated Learning, I emailed the group in advance of our session: “I promise to make our session fun and interesting. The goal is show how you and the team can use insights you already know to be more personally effective, work together better, and increase customer satisfaction. You'll benefit by building empathy, encouraging the salon/spa to run even more smoothly, and making the people who come to the spa even happier with what you offer.”

I personalized the standard FourSight presentation. I wrote specific flip charts and drew cartoons with scenarios that related to their work. I had the group card-sort their preferences in the thinking profile and asked like preferences to sit together. I also asked them to talk about what they enjoyed when they worked on a complex problem. When they discussed the preferences in detail, head-nodding confirmed that some of them felt at home in their professed preferences. I role-played a client with each preference with them and asked how they'd go about making that client feel listened to. At the end of the session, they discussed what they found useful, how they could apply FourSight, and what they might do differently because of this new knowledge. Their observations were sharp, and Tammy asked to keep the flip chart.

I spent about five hours preparing for this facilitation, including securing the appointment, designing the session, preparing the flipcharts, assembling handouts, and shopping for snacks. The session itself lasted two hours, and I spent another 30 minutes following up two days later.

This was a stretch assignment for me because I was teaching this group about FourSight without the benefit of the actual assessment. It was also a stretch because I had to approach the presentation in a way that would be relevant for their work.

Specifically, I learned customization can pay off. The staff quickly picked up the principles. I drew energy from their debriefing, and was gratified that they articulated how they could use insight about preferences in a host of ways. During the follow-up meeting, for example, one of the attendees told me that she was glad to learn about the FourSight preferences. "It gives me much nicer names to call difficult customers than the ones I usually use," she said.

Case Study Number 10: Debriefing a Professional Facilitator

For the final session in this assignment, I offered to give a group FourSight presentation and debriefing to Gerriann, the owner of the human resources group I'd worked with at the beginning of the season, as well as the firm's legal counsel and chief financial officer. Gerriann is certified in a number of assessments herself, including the Birkman Method, a psychometric measure designed to aid team building, leadership development, and career counseling.

As I've done in the other FourSight assessments I've conducted, I emailed the link to the measure to the participants two weeks in advance of the meeting we scheduled. In reviewing the results, I saw that the group consisted of two Drivers and one Clarifier. I determined to help them articulate how the varied styles help them collaborate, and how to use tools to assist them in developing ideas. I knew, however, because these were somewhat sophisticated consumers of assessments, I would have to relay more technical information than I had to other groups. So I discussed the history and correlations of FourSight.

The facilitation itself was held in a restaurant at Gerriann's insistence. I knew from previous facilitations in restaurants that I would have to make sure I was heard, and that I held their attention. My tactic in this case was to split the facilitation in two parts—discussing FourSight (much like I'd done at the salon) before the food arrived, and delivering their results after the meal. My plan worked as well as could be expected.

After dessert, we went over their high and low preferences. I taught the Evaluation Matrix with the example of buying a new laptop; and PPCo with the notion of a team retreat, something they'd already been weighing. But before I could debrief with the questions about what they'd found useful, Gerriann brought out their Birkman profiles to see how they might align with FourSight preferences. I hadn't expected that. Fortunately, there seemed to be at least anecdotal parallels between the two measures, and I used that to ask open-ended questions in the debriefing. Gerriann spoke for the group when she said she saw value in FourSight, but her experience with Birkman led her to prefer it.

This was a stretch assignment for me because it entailed delivering and debriefing an assessment to people whose business it is to deliver and debrief assessments. The risk was that my presentation would lack their finesse, but I persevered because I knew I would learn a lot in the process.

Specifically, what I learned is that taking the lead from a client and veering from the plan can be worthwhile. During the session, I was reminded of my interview with facilitator Siri Lynn, who said, “Spend a lot of time planning so the material gets in your mind. Once that happens, you can be flexible and be in the moment.” I believe allowing them to compare the Birkman Method to FourSight made a difference in the group’s overall positive reaction to the session, if not necessarily to the measure.

Moving on with My Practice

Learning any new skill requires openness to experience and willingness in equal parts to fail and succeed. Like others I’ve mastered, the facilitation has required faith that I can focus on the possibilities of the process rather than the limitations. Without experience, it’s difficult to know which experiences will stretch you, and which will undo you. The experience itself becomes more important than fear of failure. But the process is immersive, which helps you out. Case in point: it often takes exponentially longer to contract with a client and design a session than it does to deliver the session. Concentrating on the process becomes—in a successful session—a sort of meditation on the power of transformation.

My encounters revealed to me that learning facilitation differs from learning other skills in an important way: You must continually engage the other in your work, managing their expectations as well as your own. You must put them first in the process, and value their accomplishments. You must see that in any session, yours is only one of many egos. The ability to think of others first can keep your own expectations in check, freeing you to do a better job. It is an interesting—if not to say challenging—psychological overlay.

How am I ready to move on to more facilitation experience? I can sense an improvement in my skills, and positive reinforcement always helps. I’m cultivating an attitude that balances self-confidence with the notion that I’m constantly learning and improving.

My next steps are to regularly facilitate for some of these groups I’ve already worked with, and to reach out to others so I gain a diversity of experience. In May, I’ll conduct another series of retirement workshops at the university. The clay conference director has asked me to help throughout the committee development process. The dental school at the university has asked me to help design and facilitate a faculty retreat later

this summer, as well as a career talk this fall. And I've been asked to host a daylong session in late June for a graduate class in the business school.

What I see myself doing next is taking advantage of these opportunities—and seeking fresh ones—to become a better facilitator. I've grown to savor those quiet moments before my sessions, and want to keep in touch with the instant when planning shifts to reality.