

How to Select Facilitators

Introduction

Selecting the right people is critical for an organisation 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 do training. This is not the best way to select Facilitators and this Briefing Note 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 development 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 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 development 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 inter-departmental knowledge about the organisation gained from their facilitation assignments provide valuable skills for their 'day job' (and 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 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
- Maybe a few people (but certainly not the majority) who have done training or facilitation before

The last of these is the least important and experience shows people with preconceptions tend to fiddle with the approach, adding in bits and pieces they've learned elsewhere rather than working consistently. Should people with previous 'experience' be selected, it is important to understand the need for consistency between Facilitators.

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 is 7 days split over three modules at roughly 2 monthly intervals in a 3 day + 2 day + 2 day format.
- (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.
- (3) Attend Facilitator Network Meetings
- (4) Attend top-up and refresher training

Who should be ruled out?

Anyone unable to be released from their day job should be discounted.

Or should they? This is more a philosophical rather than 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.

Having said this, the inability to be released from the day job is by far the most common reason Facilitators drop out of the pool.



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 respect for colleagues and their views
- (4) Is articulate
- (5) Is numerate
- (6) Gives adequate preparation to tasks and is generally well organised
- (7) Is not overbearing
- (8) Has the respect of their colleagues
- (9) Is positive

Desirable - the person...

- (1) Can stick with a task despite difficulties
- (2) Enjoys a challenge
- (3) Is able to make a point in a constructive manner
- (4) Is prepared to ask for help when they get stuck
- (5) Has been involved in projects
- (6) Has demonstrated an interest in learning

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.

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
- Lack of confidence in groups

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):

Too hard to release

Some individuals never get released from their day job to carry out assignments - the commitment required has not been fully understood by the individual or their line manager.

Attended for personal development

Some 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

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 diversity

There is a lack of diversity. This might be a lack of balance in seniority/experience - the group is all 'senior' or all 'junior'. It could also be one or two departments nominate the vast majority of participants and the others don't play ball. A good mix is required.

Next steps for Facilitators

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.