Facilitator Development Programme

Background and who should attend

Using UIMPROVE Facilitators in projects and meetings, and for the control and improvement of processes dramatically improves productivity and effectiveness. Training Facilitators creates a strategic resource that can be allocated in line with the organisation's priorities. It takes just one project that delivers a better outcome, on-time and on-budget to create a return on the investment. Every other improvement and benefit is a bonus.

The Facilitator Development Programme teaches participants the UIMPROVE approach to organisational improvement and provides them with the knowledge and skills to facilitate this. The UIC has been training people for this role in a wide variety of industries and organisations since 1992 and the programme is always being refined and improved based on the practical experience of those we train.

This is a 9 day programme spread over 3 x 3 day modules. The period between each module should be around 2 months allowing participants to gain experience of using what they have learned in the intervening time. It is ideal if Facilitators can be allocated to assignments both before and during the programme. Modules 2 and 3 incorporate review and planning of these.

The role of Facilitator is usually a part-time activity, taken on in addition to the day job. The Facilitator Development Programme is specifically designed for people who will have to take up a formal Facilitator role in meetings or projects.

This programme will not only provide your organisation with a highly capable facilitation resource, it will also dramatically accelerate the rate and efficiency of improvement. Additionally, you will develop 12 people who are structured in their thinking, highly capable of improvement and get a good grasp of the cross-functional nature and complexities of the organisation through the assignments they carry out.

Parallel activity

We have found that training Line Managers in UIMPROVE at the same time as 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, the Organisational Improvement Programme and the Strategic Improvement Programme teach Line Managers and Executive Teams to use the skills in a range of settings and 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 in an organisation?
- What your Facilitators will be able to do
- A brief overview of the programme
- How to select and make best use of your Facilitators
- Ongoing support for your Facilitators from the UIC

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, event or project to achieve whatever it is a group wants to do. Poor structure makes for poor group working and ultimately poor results.

(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 and results.

(3)   Group working skills

We have found that traditional facilitation skills training places 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.

More recently, Facilitators trained in approaches such as Lean, Six Sigma and Agile learn tools and techniques but miss out on the philosophy of improvement and the link to group dynamics.

A UIMPROVE Facilitator learns a holistic and integrated approach to organisational improvement - directly linked to the Mission, Vision and strategies of their organisation. For each assignment they 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 in an organisation?

Strategy

- The resource can be aligned with organisational strategy and focused where the greatest need/return is
- Demonstrates 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
- Allows more people to be directly involved in improvement
- The skills are developed and retained within the organisation
- Ensures a more structured approach to projects
- Provides a consistent approach to and a common language for improvement
- Improves meetings
- The skills are transferable to the day job
- Use of the skills is contagious - they will spread through the organisation
- Reduces reliance on external consultants

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 Project Planning

- Convert organisational strategy into departmental or team objectives
- Identify and prioritise the projects to be done over 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 for tricky team-based projects.

Facilitate a Project Kick-Start

- Obtain a wide range of involvement at the outset
- Use a structured approach, tools and techniques to ensure balanced participation
- Carry out scoping and initial planning
- Save time
- Increase understanding, alignment and commitment from those involved

Facilitate a Process Planning Event

- Use a structured approach and analytical tools (specifically an Ishikawa Diagram and Deployment Flowchart) to plan a new process

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

Facilitate a Customer Involvement Event

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

Facilitate a Project Update

- Reconvenes the group from the Project Kick-Start to report on progress, present findings and proposals, obtain their feedback and input

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

Facilitate Piloting and Implementation Events

- For projects that have reached the stage where proposals first need to be tested, then incorporated into routine operation

Facilitate a Project Review

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

Facilitate meetings (regular, e.g. a Team Meeting, or one-off)

- 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.

Facilitate Systems Events

A Systems Event is for a management team (leader and Direct Reports) and enables them to work on controlling routine operation by:

- Identifying the systems and processes for which they are responsible
- Defining the aims of the systems and purposes of the processes

Facilitate a Routine Operation Review

Also aimed at management teams, the purpose is to take an annual look at the big picture of how all systems and key processes are performing, whether resourcing is right and whether any interventions are needed.

A brief overview of the programme

Style and structure

What sets the UIC aside from many providers is that we don't just do training. We carry out consultancy, facilitation and project work ourselves and use what we teach daily. Therefore 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

Module 1 - focus on organisational improvement and projects

- 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 Project Planning
- Project Kick-Starts

Module 2 - focus on meetings and additional assignments

- Review session - what people have applied since last time
- Effective meetings
- Techniques for Productive Meetings
  - Getting the Basics Right
  - Getting Information Across
  - Getting Things Done
- Making interventions in meetings
- Tools for Evaluation and Decision-Making
- Project Events continued
  - Customer Involvement Event
  - Project Update
  - Project Refocus
  - Project Review
- Facilitating throughout the life of a project
- How to do Real Work in meetings - Putting structure to a topic
- Planning for forthcoming assignments

Module 3 - focus on piloting and implementation, controlling and improving routine operation

- Review session - what people have applied since last time
- Introduction to processes
- How to control a process
- Routine Operation Events: System Events, Routine Operation Review
- How to improve a process
- Tools for Analysis
- Project Events concluded
  - Process Planning Event
  - Process Analysis Event
- Piloting and implementation of projects
  - The Piloting and Implementation Methodologies
  - Piloting and Implementation Events
- Planning for forthcoming assignments
- Review of the programme

How to select and make best use of your Facilitators

There is a separate Briefing Note 'How to Select Facilitators', available on request or as a download from the website. This can also be found in The Complete Guide to Improvement.

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

Ongoing support for your Facilitators from the UIC

After their training, your Facilitators will continue to be supported by the UIC. Firstly they will have received our comprehensive manual - The Complete Guide to Improvement. This contains everything covered during the programme and much more. We think our manuals are the best on the market. Your Facilitators will also be able to access a variety of on-line resources.

We will also have kitted out your Facilitators with the tools they need to do the job so that they can walk out of the door and start work without having to order lots of stationery.

We can provide ongoing 1-1 coaching following the programme if required. Typically a UIC Consultant will be engaged for a day to provide a series of coaching sessions. These can be used to help individuals review or plan assignments.

Finally, we are always pleased to offer support and guidance by phone or e-mail. There is no additional charge for this, we view it as part of the service.