



# The Global Flipchart

MAY 2009

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International Association of Facilitators  
14984 Glazier Ave,  
Suite 550  
St. Paul, MN 55124  
[office@iaf-world.org](mailto:office@iaf-world.org)  
+ 1 800 281 9984  
(toll free, US & Canada)  
+1 952 891 3541  
Fax +1 952 891 1800

Gary Rush  
Chair  
[iafchair@iaf-world.org](mailto:iafchair@iaf-world.org)

The Global Flipchart is IAF's monthly newsletter  
Jim Troxel, Editor  
[globalfipchart@iaf-world.org](mailto:globalfipchart@iaf-world.org)

## Member of the Month May 2009

### **GFC: How long have you been a member of IAF, Jo?**

I'm a founding member and also a life member.

### **GFC: Tell us a little about the organization you work for?**

I work with ICA Associates, Inc. in Canada. We are a facilitation and training organization. We do all kinds of facilitation, and also train facilitators. In conjunction with the non-profit Institute of Cultural Affairs: Canada, we also publish books on facilitation.

### **GFC: What is your job within the organization?**

I'm one of the owners of ICA Associates, and I am a principal facilitator and trainer. I have published a book called "The Art of Focused Conversation for Schools", and right now I'm working on a research project that I hope to end in a published article on "Creating New Knowledge using the Consensus Workshop Method". I'm also working with a team to develop ToP (Technology of Participation) online tools for collaboration. I also volunteer with ICA Canada to train young people in the "Youth as Facilitative Leaders" program, and with ICA's in other countries to develop their facilitation expertise.

### **GFC: How do you use facilitation in your line of work?**

I am constantly either facilitating groups in almost any sector, or training facilitators. I have a lot of experience working with educators, and also with First Nations or aboriginal people.



**Jo Nelson**  
Toronto,  
Ontario, Canada



### **GFC: Share a recent facilitation experience.**

A creative facilitation experience last year was a consultation process with Alberta Education on the topic of Distributed Learning. One part of the process was training focus group leaders, who worked with over 2000 citizens to come up with emerging trends affecting education. Then I facilitated a group of 40 people to come up with the major trends, driving forces, and four possible scenarios of the future. The group then built the "pillars" for governance to be in an advantageous position for any possible future.

The second part of the process involved over 400 people at 49 tables in 8 locations across Alberta simultaneously, linked by videoconference and live internet. Each table worked through the "pillars" and came up with recommendations that were posted online. Then we did a web poll for the participants to "vote" for a recommendation for each of the pillars. Finally each table brainstormed, clustered, and prioritized next steps and

## News from the Board of Directors

uploaded them. As far as we can tell, this is the only distributed event where people have done real creative work simultaneously and shared it via both videoconference and web. It took a lot of expertise in technology, facilitation design and training.

Another really incredible experience was designing and guiding the facilitator team for the ICAI Global Conference on Human Development in Takayama, Japan. We had 20 volunteer facilitators (many of which were IAF members), and participants from more than 40 countries. We had a web dialogue tool that led up to the conference. The group came up with some really grounded, positive results. (Google YouTube with the conference name to find the 10 presentations and the conference declaration.)

***GFC: If you could share one thing you've learned with other facilitators around the world, what would it be?***

The learning I'd share is that careful, thoughtful design of process is absolutely essential for a facilitation to work, especially with a really large group. In all of these processes, we used a wide range of techniques, including Focused Conversations, Consensus Workshops, Social Process triangle plotting, Scenario-building, polling, World Cafe, and Open Space, among others.

***Thank you, Jo. The IAF values your members!***

A couple of days before the North American IAF conference the IAF board meeting was held. It was a pleasure to meet Mark Edmead from San Francisco who is stepping on to the board as the Communications and Publications Director. Key areas that were discussed at the meeting were the development of a community outreach awards programme; implementation of CPF re-certification; spacing out the conferences internationally; our 2009 goals and the needs and roles on the board; we also discussed the implications of creating chapters and the board endorsed the Core Principles for Public Engagement put forward by a consortium of the National Coalition of Dialogue and Deliberation, the International Association of Public Participation and the Co-intelligence Institute.

Stephen Thorpe  
IAF Secretary

# IAF North America Conference - Vancouver, BC, Canada



# Reflections on the IAF North American conference in Vancouver

By Stephen Thorpe



It was a real privilege for me to participate in the IAF North American Conference in Vancouver on 21-23 April. The conference was

attended by more than 300 facilitators from 26 countries. The theme for the conference was *Exploring Diversity*. I thought I would share with you some of my experience at the conference and to also share a few resources from the workshops I was involved in leading and attending.

## The Conference Welcome

We were welcomed by to the conference and to Vancouver by conference convener Angela Sealy and her welcome was followed with a First Nation's Prayer.

Then we moved into dinner and Dr. Brian Little gave us a very interesting and humorous key-note address on his area of personality traits research – helping us to understanding ourselves and pointing out some differences that may help us to improve and enrich relationships in our work and personal lives.

Following Dr. Little's presentation, Jo Nelson, a Past Chair of IAF, lead an interactive session with those who stayed after the key note address.

## Workshops

### *Enhance Your Online Facilitation with Storytelling*

Stephen Thorpe from Zenergy and the Auckland University of Technology

After the morning plenary session the first workshop I went to was my own

session - on the use of storytelling in online facilitation. The session offered some of my key findings from doctoral research with 17 other IAF facilitators, in 7 countries, across 12 time-zones investigating the use of storytelling in online groups.

The research itself had roots at an earlier IAF North American Conference in Fort Worth, Texas in 2002 where VCI Dale Hunter had introduced me to Sandor Schuman. The three of us had breakfast together and Sandor introduced me to 'grits' for the first time and he also told me about his father who was a wonderful storyteller. I was interested in doing some research on online group facilitation and a couple of years later the two topics of storytelling and online facilitation came together in a research project that has been conducted, written up and is now at the markers.

The workshop looked at the use of storytelling within a variety of online media, including: email; telephone, video and web conferencing; instant messaging; discussion forums; blogging and in the 3D interactive world of Second Life. For more details I've put the workshop slides and resources up online: [www.iaf-anz.org/docs/E4.htm](http://www.iaf-anz.org/docs/E4.htm)

### *Facilitating Across Cultures and Across Generations; Challenges and Opportunities*

Keith Ryall, Michelle Golden and Stephen Thorpe

At the 2nd workshop I went to I had the honor of co-leading with facilitators Keith Ryall and Michelle Golden. The workshop was an interactive one that drew on the collective intelligence of facilitators working with a wide range of groups across differing cultures and multiple generations.

We introduced a couple of workshop resources and invited participants to articulate and categorize their biggest challenges when working with diverse groups. They then moved into small groups to come up with possible processes and solutions. Participants were then given the IAF Core Facilitator competencies as a fresh filter for reflecting on the processes and solutions they were developing. Then they we asked to review their processes and solutions from the different generation's perspectives to see how they might intervene differently as a group facilitator or how they may prepare differently for a session.

The workshop resources and pre-reading are also up online: [www.iaf-anz.org/docs/E4.htm](http://www.iaf-anz.org/docs/E4.htm)

### *Contracting as a Collaborative Process: Advanced Models, Skills & Tools* Dr. Sam Kaner

This was a real gem. I've put the key learning ideas straight into my practice already. Finding ways to help people from their first contact was a key message I took away, as well as building the collaborative relationship from the first sentence – not waiting until the agreement or contract has been made to do the work. Sam provided an insightful and practical framework that would be effective right across a wide range of contracting relationships. I particularly liked the process around following one directive question by two non-directive ones – it made me rethink the questions I ask when someone calls on the phone.

### *Enhance Your Meetings Using Conversational Leadership: Getting those 60 Minutes of Your Life Back* Ray Jorgensen

The key focus of this workshop was on

## Method of the Month

### Title: Five Finger Consensus

stewarding learning conversations rather than controlling the focus and direction of meetings. Ray introduced us to the methodology and practice of his conversational leadership process. One of the things I really appreciated about the approach Ray used was inviting us to form groups and have our conversations standing up. Not something I would normally do, but seemed to be quite effective.

Overall the whole conference was a great learning experience and I really enjoyed the connections I made, new and old, with facilitators working across a wide range of areas with a real passion to learn and share with each other. Each of the IAF conferences has its own flavor and I can really recommend the opportunities that facilitators can gain from going to one of these events in any region of the world.

The Method of the Month is a monthly feature of the Global FlipChart.

Each month a method will be highlighted and links will be made to relevant sites.

#### Title: Five Finger Consensus

**Intent:** To help a group achieve consensus WITHOUT having to water down a strongly supported solution

#### Procedures:

Five-finger consensus is designed to encourage significant agreement without jeopardizing the quality of the solution.

Here's how it works. Once an alternative is proposed and discussed, and the group is ready to check for agreement, the facilitator explains that on the count of three, each person should hold up between one and five fingers indicating the level of support for the recommendation on the table: - 5 – Strongly agree - 4 – Agree - 3 – Can see pluses and minuses, but willing to go along with the group - 2 – Disagree - 1 – Strongly disagree and can't support. If everyone shows a 5, 4 or 3, consensus has been reached, and we can move ahead.

If there are any 1s or 2s, those who indicate such are given the opportunity to explain to the rest of the group why they gave the rating and make recommendations to change the alternative in order to make it acceptable to them. The originator of the alternative has the option to make the change or leave the option as it is and explains the decision to the rest of the group. Then the facilitator tests five-finger consensus again. If everyone shows a 5, 4, 3 or 2, the decision is made, and we can move ahead.

If there are any 1s, those who indicate such are given the opportunity to explain to the rest of the group why they gave the rating

and make recommendations to change the alternative in order to make it acceptable to them. Once more, the originator of the alternative has the option to make the change or leave the option as it is and explains the decision to the rest of the group. In the final review, majority rules. The decision is made based on the majority of the participants. Five-finger consensus encourages the group to listen carefully when there is disagreement; and, in fact, encourages listening carefully twice if necessary. But the technique doesn't allow a solution to be watered down because a few disagree. Though admittedly there may be one or two who don't like the alternative, our belief is that five-finger consensus helps ensure that they all are heard, and heard well.

**References:** Michael Wilkinson at <http://www.leadstrat.com> .

***Do you have a method you would like to share with readers of the IAF Global FlipChart? If so please send a description of the method to [editor@iaf-methods.org](mailto:editor@iaf-methods.org)***

The IAF Methods Database is run as an independent organization under agreement between the IAF and the IAF Methods Database. If you have any questions about the Database, please contact [editor@iaf-methods.org](mailto:editor@iaf-methods.org)

Last month we had 136,777 page visits an increase of over 25,000 more than last month. We have more than 130 methods listed. We have 4854 users registered, an increase of 164 this month. We now have 116 suppliers.

#### Podcasts

Occasionally we publish podcasts by facilitators. We hope to have more. If you would like to submit a podcast for the site please contact [editors@iaf-methods.org](mailto:editors@iaf-methods.org).

## CORE PRINCIPLES FOR PUBLIC ENGAGEMENT - A DRAFT

*The National Coalition for Dialogue & Deliberation (NCDD), the International Association of Public Participation (IAP2), and the Co-Intelligence Institute are leading a collaborative effort to develop a standard set of principles they hope organizations in the field of public engagement can agree on. With new attention and emphasis on collaboration, participation, and transparency thanks to the leadership and vision of the Obama administration, they feel it is more important than ever to provide clarity about what we consider to be quality public engagement. Please feel free to contact NCDD's director, Sandy Heierbacher, at [sandy@thataway.org](mailto:sandy@thataway.org) with questions or comments. This is their Draft 3.0, completed on April 6, 2009.*

There are many ways that people can come together to deal with issues that affect their lives. We believe that public engagement involves convening diverse yet representative groups of people to wrestle with information from a variety of viewpoints, in conversations that are well-facilitated, providing direction for their own community activities or public judgments that will be seriously considered by policy-makers and/or their fellow citizens.

It is our stance that quality public engagement must take into consideration seven core principles if it is to effectively build mutual understanding, meaningfully affect policy development, and/or inspire collaborative action among citizens

and institutions.

The following seven principles overlap and reinforce each other in practice. They serve as ideals to pursue and as criteria for judging quality. Rather than promoting partisan agendas, the implementation of these principles generates authentic stakeholder engagement around public issues.

### The Seven Core Principles

1. Planning and Preparation - Plan, design, and convene the engagement specifically to serve both the purpose of the effort and the needs of participants.

2. Inclusion and Diversity - Incorporate diverse voices, ideas, and information to lay the groundwork for quality outcomes and democratic legitimacy.

3. Collaboration and Shared Purpose - Support organizers, participants, and those engaged in follow-up to work well together for the common good.

4. Listening and Learning - Help participants listen, explore and learn without predetermined outcomes -- and evaluate public engagement efforts for lessons.

5. Transparency and Trust - Promote openness and provide a public record of the people, resources, forums, and outcomes involved.

6. Impact and Action - Ensure each participatory effort has real potential to make a difference.

7. Sustained Participation and Democratic Culture - Promote a culture of participation with programs and institutions that support ongoing quality public engagement.

This list represents a consensus in the field of dialogue and deliberation, but most practices tend to emphasize or apply these principles differently or to reach beyond this basic consensus in one way or another. To learn more about such diverse understandings and applications, consult the online version of these guidelines at [www.thataway.org/2009/pep\\_project](http://www.thataway.org/2009/pep_project).

Finally, we believe the use of technology should be generally encouraged whenever appropriate to enhance and not impede these seven values -- and also that these seven principles apply to both online and offline efforts. However, there is not yet consensus in our field on standards for the use of technology that would warrant the inclusion of specific online or electronic guidelines in this document.

## Recertification Process is Now Underway



The long anticipated IAF Certified™ Professional Facilitation Re-Certification program is

now in the process of being rolled-out. Since the inception of the CPF program in 1998, our profession has continued to grow. The IAF Certified™ Professional Facilitator designation is now recognized around the as the IAF has certified over 690 facilitators in over 40 countries.

The re-certification process was part of the original design of the CPF program. After several years of focusing solely on the CPF program itself, I am pleased to announce we are now at a point to roll out the IAF CPF Re-Certification Program.

One of the questions often asked by IAF members is, **“What is the purpose of the re-certification process?”** Like most professional organizations that offer a certification program, the purpose of the IAF Certified™ Professional Facilitation Re-Certification Program is:

To ensure that the IAF Certified™ Professional Facilitator designation continues to be held by those actively working in the field.

To sustain and enhance the credibility of the IAF Certified™ Professional Facilitator designation.

To encourage members of the IAF who are CPFs to pursue ongoing professional development aided by ongoing peer review and feedback. To meet the increased demand for certified facilitators found in many Requests for Proposal (RFPs).

If you have any questions, please feel free to contact [recertify@iaf-world.org](mailto:recertify@iaf-world.org) or [prof.dev@iaf-world.org](mailto:prof.dev@iaf-world.org).

**Michael S. Spivey**

IAF Professional Development Strategic Initiative Coordinator

Email: [prof.dev@iaf-world.org](mailto:prof.dev@iaf-world.org)

Web: [www.iaf-world.org](http://www.iaf-world.org)

*The safest principle through life, instead of reforming others, is to set about perfecting yourself.*

*B. R. Haydon*

**Congratulations to our newest CPF's  
certified at the IAF North America Conference  
Vancouver, Canada  
April 24 - 25, 2009**

**Canada**

Wayne Chamney, CPF  
Christopher J. Comeau, CPF  
April English, CPF  
Julie Fillion, CPF  
Gail Franklin, CPF  
Julian Griggs, CPF  
Wendy L. Hassen, CPF  
Janice Johnson, CPF  
Anne Kaye, CPF  
Diane King, CPF  
Candy Lannan, CPF  
Jorge E. Ocegüera, CPF  
Dave Robertson, CPF  
Nora Sheffe, CPF  
Nadine Warkentin Brain, CPF  
Katharine M. A. Weinmann, CPF

**Hong Kong**

Lilian L Y Wang, CPF

**Korea**

Young Sook Lee, CPF

**Saudi Arabia**

Abdullah Khalid Al-Hemail, CPF

**Togo**

Kofi Agbe Keleli Kumodzi-Dzevi, CPF

## Upcoming IAF Events

### Conferences

**29 - 31 August 2009 - Asia**  
Taipei, Taiwan

**18 - 20 September 2009 - Europe**  
Oxford, England

**24 - 26 September 2009 - Latin America**  
Bridgetown, Barbados

**26 - 27 October 2009 - Africa**  
Capetown, South Africa

**23 November 2009 - AUS/NZ**  
Nelson, New Zealand

### Certification Events

**27 - 28 August 2009 - Asia**  
Taipei, Taiwan

**16 - 17 September 2009 - Europe**  
Oxford, England

**22 - 23 September 2009 - Latin America**  
Bridgetown, Barbados

**16 - 17 October 2009 - North America**  
Kennesaw State University - Kennesaw, Georgia

**26 - 27 October 2009 - Africa**  
Capetown, South Africa

**2 November 2009 - Europe (in Dutch)**  
Rossum, The Netherlands

**23 - 24 November 2009 - AUS/NZ**  
Nelson, New Zealand

## Welcome to New Members!

We extend a warm welcome to our colleagues from around the world who joined or returned to IAF from January 11th through February 10th. (We only list those members who have chosen to be listed in our online membership directory. If you are concerned about having been included in this list, please contact the office via email at [office@iaf-world.org](mailto:office@iaf-world.org)).

### **Current Membership from 70 countries: 1228±**

#### **Canada**

Andy Swiderski, Victoria, BC  
Anita Cameron, Keewatin, ON  
Helen Scutt, Guelph, ON  
Loie Unwin, Edmonton, AB  
Olga Gladkikh, Antigonish, NS  
Tanya Ney, Victoria, BC

#### **India**

Henk Sengkey, Bandung

#### **Malaysia**

Joanne Koo, Kuala Lumpur

#### **New Zealand**

Hamish More, Wellington

#### **South Africa**

Reginald Manthata, Isando

#### **United Kingdom**

Stuart Reid, London

#### **United States**

Donna Childs, Dayton, OH  
Faye Dresner, Decatur, GA  
Fonda Mangino, Plano, TX  
Jewel Ware, Chicago, IL  
Stephen Denney, Garland, TX