



February 2011

Global Flipchart

A View from the Board

Martin Gilbraith, IAF Chair

in Manchester, UK



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From January 24th to 27th, your new IAF global Board of volunteer Directors met face-to-face in London for their first board meeting. By meeting face-to-face promptly after the elections, I believe this new Board has had the best opportunity to get up to speed and become effective quickly – and for Directors to enjoy and gain satisfaction from their roles as well. I am happy to report that we were able to keep the financial cost of our four-day meeting to little more than that of the one- and two-day Board meetings held in conjunction with conferences in recent years.

Our feeling was that this meeting, and this year, mark something of a turning point for the Board and for IAF; so we wanted to share directly with all members something of the meeting, and of our understandings and commitments as a Board. We are grateful for the time and expertise devoted by our many predecessors on the IAF Board; we wish to build further on their hard work and accomplishments. Minutes of the meeting will be available to members after they are ratified at our next meeting on March 9th, which is the first of the year's monthly Board conference calls.

The full Board meeting began with an opening session late afternoon on

Monday, January 24th, and closed at lunchtime on Thursday, January 27th. All but one of the 15 Directors were able to attend the Board meetings in person. Prior to the meeting's start on Monday and after its conclusion on Thursday, there were important meetings involving one or more Directors, plus other active UK & Europe-based members. Ten of us had just been newly elected or re-elected, and seven of us Directors were entirely new to the Board. We travelled from as far afield as Australia, New Zealand, Taiwan, Nigeria, Barbados, Canada and the USA, and from as nearby as Austria, Switzerland and the UK. We met at a modest hotel in central London. The WIFI was intermittent and the coffee was not good, but the space was fine and the price was right! Directors had diligently studied an enormous quantity of documents and other files shared in advance of the meeting.

The introductory exercise we used for Monday's opening session is now available on the IAF Methods Database (www.iaf-methods.org), titled 'Just one Lie'. It's also featured in this issue of Global Flipchart. (See page 4.) On Monday, we reviewed and reflected on IAF's mission and values, and on our own motivations and aspirations as Directors. Tuesday morning, we focused on

International Association of

Facilitators

14984 Glazier Ave,

Suite 550

St. Paul, MN 55124

office@iaf-world.org

+ 1 800 281 9984

(toll free, US & Canada)

+1 952 891 3541

Fax +1 952 891 1800

Martin Gilbraith, Chair

iafchair@iaf-world.org

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Karyn Dumble CPF and Sharon Cathers, Editors

A View from the Board Continued:

orienting ourselves to the Association's governance, management, operations and finances, and to its history and context. Tuesday afternoon, we reviewed the interim findings of the current members' survey before focusing on our five-year practical vision for IAF. Thanks to the more than 300 members who have responded to the survey. This represents about a quarter of our membership. Your responses provided rich and statistically significant input to our deliberations. On Wednesday, we focused on blocks and obstacles to the vision, our strategies to overcome these and realise the vision, and our plans and budget for the year. On Thursday morning, we turned our attention to action planning and to some more traditional Board decision-making through resolutions on particular agenda items. Each evening allowed us to spend time together for the informal networking and relationship building that is so critical for a Board, or any team, to perform effectively together.

During the orientation session, we reviewed the Association's governance and management in terms of legal structures, regulatory compliance and contractual arrangements, and in terms of the IAF Board manual's documentation of roles and responsibilities, as well as the policies and procedures. We identified some policies and procedures that presently exist but which are in need of review, and some which are absent and in need of development. **The Board is committed to ensuring good governance and management of IAF, and to hold itself properly accountable to the membership on that basis.**

We noted that membership numbers seem to have levelled off in the past six months at around 1,220. Membership retention has fluctuated between around 60-70% during the past two years. Two local chapters have so far been approved since the new chapter model was launched last year (Hartford, Connecticut, USA and Denmark), and many more are already in development – including in the UK, following a meeting of UK members with some Directors on the Thursday afternoon after the Board meeting. This is already resulting in an increase in more local networking and professional development activity, and also in membership. **The Board is committed to delivering membership growth, through improved retention and local chapter development, and by appealing not only to self-identified professional facilitators, but to all those who use and have an interest in facilitation.**

During 2010, 94 CPF candidates were assessed by 32

assessors at nine events; compared to 69 candidates at seven events in 2009. We are grateful to the many members who contribute their time and expertise to delivering and developing the CPF programme each year. **The Board is committed to growing and diversifying the CPF programme, in terms of numbers, specialities, geography and language.**

Four IAF conferences were convened by the regions last year: Chicago, USA; Helsinki, Finland; Bridgetown, Barbados and Seoul, Korea. The finances of IAF conferences in the regions each year are now managed by local conference contractors and partners, and only occasional surpluses and deficits contribute to or draw from IAF's global funds. Generally in recent years they have contributed and drawn little or nothing at all. A notable exception in recent years has been the North America conference; as a result, this has been the subject of considerable Board attention. That conference is now in the final year of a multi-year contract with a conference management company and hotel chain, entered into before the recession hit and the attendance in North America was higher. The Chicago 2010 conference was also hurt by disruption to air travel caused by the Icelandic volcano eruption. The contract has been renegotiated and costs controlled as far as possible. We are satisfied that the 2011 Denver conference is being managed with the necessary care and prudence. Nevertheless, global funds accumulated to some extent from earlier years' surpluses in North America have been depleted by losses totalling around US\$80,000 since 2009. Subsequently, global funds available totalled around US\$100,000 at the close of 2010, of which US\$50,000 was designated as a contingency reserve. **The Board is committed to ensuring that IAF's finances are responsibly budgeted and managed, and to grow and diversify income streams to improve IAF's financial strength and resilience.**

The new IAF website is another area that has seen considerable investment during the past year in terms of both money and Board attention. The developer's work is now complete and the website is in place. All that remains is for us to populate it with content - revising, replacing and supplementing as necessary, as we migrate content from the existing site over the coming weeks. **The Board recognises the critical role that our online presence must play in delivering value as well as retaining and attracting members, and is committed to launching the new site by March as a basis for further development and refinement.**

We were energised and enthused by our workshop to articulate our practical vision of what we would like to see in place in IAF in 5 years' time. This laid the foundation for our analysis of obstacles and our work on strategies and actions, complementing the existing Vision (developed by the Board some years ago) of IAF's long-term role in the world.

Our practical vision for IAF in 2016 is:

- *Strong and attractive brand*
- *Strategically embracing technology*
- *Sustainable diverse and transparent financial model*
- *Reflective of, and responsive to, global diversity*
- *Vibrant local chapters*
- *Structured pathways for development*
- *Modelling best facilitation practices*
- *Demonstrating relevance and impact*

This year I hope and expect that we will see many fewer Directors retire and be succeeded at the end of the year, and that we will be able to start and complete the election process earlier in the year, in order that we can get even further ahead of the game next year. In the meantime, **please do get in touch with me or any of the 15 Directors with any questions or feedback, or to get involved in your Association.** Contact details for all Directors are at www.iaf-world.org

It is with deep regret that we report on the completed lives of two of the original founders of the IAF.

Sandra True of New York City was on the original "Administrative Task Force" that drafted the first set of By-Laws of the Association and designed some of the early operational procedures that are still in use today.

Kim Alire Epley of Denver, Colorado, was the co-host of the first "official" IAF North American conference held in Denver.

The IAF family extends its sincere condolences to their families.

METHOD OF THE MONTH

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

Just One Lie

Preparation

Have one-half a flipchart page and a pad of post-its for each individual in the meeting. At the start, have each participant write their name at the top of their flipchart page and hang it on the wall. Then have each individual put the names of all of their colleagues on post-its, one name per post-it.

Steps

1. At the start of the session, ask the group to mingle, asking one another questions to get acquainted, such as “What sports do you like?” “Where do you like to take your holidays?” “What is your favorite food?”; or about their career, such as “How did you get into facilitation”, “When did you join IAF”, “What is your greatest facilitation achievement?”; or about the meeting, such as “What is your worst fear for this meeting?”. Or just ask for one fact they would like to share with the group.
2. Tell the participants, “For every person you meet, put their name and one fact you have learned about them onto the post-it with their name. As you meet every person in the group, you should accumulate a post-it for each person.”
3. “However, as you answer questions about yourself, please ensure that one (and only one) answer you give is a lie, something entirely not true of you.”
4. When everyone has accumulated one fact post-it about everyone else, have participants distribute the post-its onto each individual’s flipchart pages.
5. Introduce yourself by reading out the flip chart page with your own name and facts, and then invite the group to guess which one is a lie. Use a red marker to identify tick every true fact until the lie is revealed, then a cross to identify that.
6. Next, introduce another participant in the same way. When the lie is revealed, it is their turn to select and introduce another.
7. As the meeting proceeds, start sessions and end breaks with the last person introduced to select and introduce another
8. By the end of the meeting everyone should have been introduced, and all but one have introduced another. Then you can celebrate the success of the person whose lie took the most guesses to reveal

This method was invented by IAF Chair Martin Gilbraith for the IAF Global Board meeting in London, January 2011

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

Facilitation Trivia!

Welcome to the new Global Flipchart Trivia Series - designed to keep our Facilitation Community thinking and in discussion about our craft. We all may learn something new as well - good luck! The answer to the below Trivia question can be found at the end of this GF issue.

Question: The term “brainstorming” refers to:

- a. Any technique used to generate ideas. It’s a generic term.
- b. An idea-generation method, found in a number of studies (as early as 1958) to be less effective than others.
- c. A procedure for generating ideas, developed in the 1940s and described in a book by Alex Osborn in 1953.
- d. All of the above.

The Global Flipchart wishes to thank Facilitation Community contributor Sandor Schuman for the new Trivia GF Series. You can find more Trivia on Mr. Schuman's blog.

<http://sschuman.blogspot.com/2010/04/group-facilitation-trivia.html>

Have you had a (mis)adventure in facilitation that you’re willing to share? Send it to globalflipchart@iaf-world.org and help prevent a fellow facilitator from making the same mistake.



The Virtual Connection

By Jerry Mings

Keeping the Group online *“Guide Group to Appropriate and Useful Outcomes”*

Groups need the opportunity to arrive at a conclusion: something they can agree with and then take action. There is nothing more powerful than a group with clarity and a sense of purpose on a given topic. In a face to face meeting, it is the energy in the room, the facial expressions and commitment to the task that appears when the group is ready to move forward. In a virtual event, you can feel the energy and see the commitment through messages, graphics and agreement to deadlines for identified tasks. This month, we explore virtual tools to support guiding a group to appropriate and useful outcomes.

Figure 1 captures five points to consider when you facilitate your next virtual meeting.

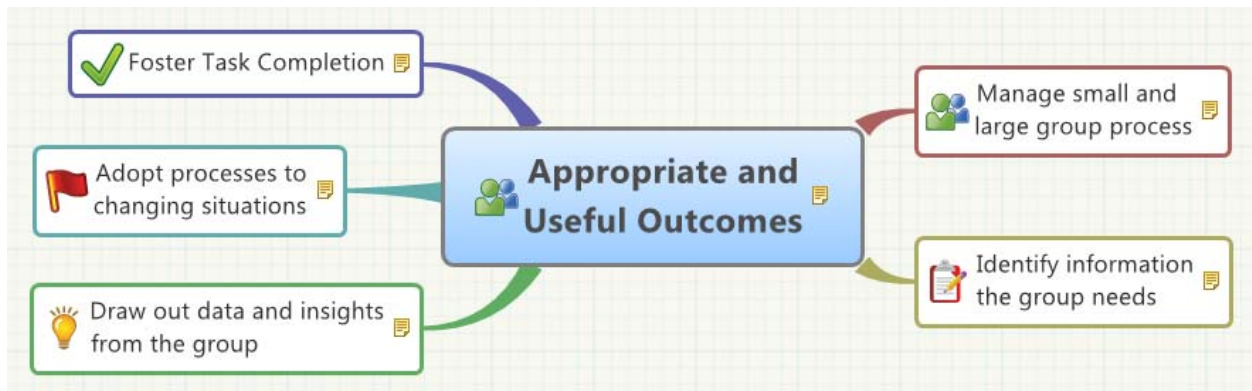


Figure 1- five Considerations for Appropriate and Useful Outcomes

Manage small and large group process

Groups need an opportunity to work through a process using a number of group configurations. Virtual software (e.g., <http://webex.com>, <http://www.illuminate.com>, <http://www.adobe.com/products/adobeconnect.html>) can provide you with the opportunity to enable the group to work in a number of group sizes. People can work in groups range from two to three people. There are two important aspects of small group work in a virtual situation:

- a) The ability to both talk and work together. Some software programs do not allow this happen or make it difficult to do. A quick workaround is to gather a group of four colleagues and practice with the software in advance. You can then discover the software’s capability to support small and large group work.
- b) Easy to understand instructions for small group work. The instructions for small group work should provide a step-by-step set of directions of what the small group should be doing their time together. It is helpful to include a timeline and some indication of how the completed work will be used by the large group.

Written instructions can be provided using a whiteboard (e.g., WebEx or Elluminate) or in writing in a document that can be provided to participants in advance or during the meeting.

Identify information the group needs

Groups need information in order to develop a shared understanding of the topic. Virtual facilitation events allow the entire group to gain access to material to help develop a context for the work. There are three important steps to assist with guiding a group through a topic to ensure they can achieve their outcomes.

- a) Everyone has access to the material – Make it possible for people to open and read materials well advance of the meeting. A good document format that works on most machines is the Portable Document Format (PDF). You can get a program to convert your document to PDF at PDF Online (<http://pdfonline.com/>)
- b) Everyone understands the material – Take time during a virtual event to allow people to ask questions of clarity, talk about parts of the material they don't understand and develop a shared understand of the material. (*Tip – you may have to give people a few minutes to read the material during the session.*)
- c) Everyone can connect the material to the work of the group – Provide a framework to enable the group to link the material to task to work the group needs to complete. One can highlight certain parts of a document, connect parts of the document with the question the group must answer or ask the client to clarify why the document is important part of the group's work.

One tip is to provide advice on how people can prepare for the session. Do they need to read the whole document? Are they questions they should consider when reading the file? Is there a section of the document they should spend more time on than another? The more information one can provide about the materials and topic in advance of the session, the easier it can be for the group to focus on achieving a meaningful outcome.

Draw out data and insights from the group

Getting a group's insights around an outcome is critical. It is helpful to have a process that will work in a virtual setting. Here are four steps that work regardless of the software.

- a) Collect the insights from the group - Use a tool during the session to collect the insights of the group on the screen. Some people use a whiteboard, word processing software or a text-based writing tool.

- b) Allow the group to organize the insights into something meaningful - I am a big fan of using mind mapping tools (e.g., XMind.com at <http://xmind.net>) to put all of the ideas into one place. The group, with your guidance, can quick organize a large number of ideas into themes to help them create a solution or outcome. You can also a word processing program or a spreadsheet to complete the same type of work. The key is finding a tool that allows you and the group to collect the information quickly.
- c) Use the Themes to create an answer – To support a meaningful outcome, use the themes collected in step B to help look for patterns or linkages between the themes. A great software application to support this work is Concept Mapping(<http://cmap.ihmc.us>). When a group is working with developing a decision, using concepts maps is an excellent strategy to take themes and develop logical well thought-out answers. (To learn more about Concept Maps, visit <http://cmap.ihmc.us/Publications/ResearchPapers/TheoryCmaps/TheoryUnderlyingConceptMaps.htm>)
- d) Keeping the insights organized and on screen - It is helpful to have all of the results organized on the screen so people can refer to them. The concept map, mind map or list of ideas will help the group see their material and identify how they want to use it. Keep the text to a size that people can see the information without straining their eyes.

Allowing people to share their ideas and keeping them organized for easy reference is helpful when group is working to achieve consensus or a specific task outcome.

Adopt processes to changing situations

Flexibility is an important element in working with a group online. A process that may work in a face-to-face facilitation may not work as planned during a virtual event. Here are three considerations to remember when using a "face-to-face process" in a virtual experience.

- a) The software may not be flexible. When using software applications, remember they may not have the ability to support small groups or allow for small group conversations. They may not support everyone typing at the same time. They may not have tools to tell you if people "left the meeting". The key is to carefully check out the

software well

in advance of the event.

- b) People can get lost. In a real life situation, people can look lost or simply not get involved in the session. In a virtual session, people can quickly escape a meeting either out of frustration or boredom. The challenge is finding ways to make sure everyone is still involved in the process.
- c) Technology can create problems. What should be easy for everyone to do online can be a challenge for some members of the group. For example, some participants may report the screens look different, the audio is hard to hear or they keep being disconnected from the session.

In order to anticipate and address challenges, talk with people with participants during the session to ensure the group is still on track. Check-ins can include:

- a) A short break to allow you time to follow up with people who are having difficulties
- b) A virtual “hands up” or a quick poll to see if everyone is at the same place in the process
- c) A conversation to identify if the process needs to be changed to adopt to the needs of the group
- d) Using the “chat window” to ask people, “are you still there?”, “Any problems?” etc.

Changing process in the midst of the virtual facilitation is best done as collective effort between the facilitator and the group. It enables everyone to stay on track and stay focused the objective of the session.

Foster Task Completion

At the end of a good virtual session the group should have the ability to identify something they have accomplished. One sign I enjoy watching is the group willing to take action on the result they have achieve. When a group can see how they can individually and collectively take action, the entire session moves to a new level of engagement for the group.

There are some great tools one can use to support group action. Here is a short list to consider.

- a) Write out the Consensus Points. Create a written record of the group’s decisions so they can see them live during

the meeting. You can use the text editor, MSWord or any program that can record the decision so the group can see the wording.

Create a Virtual Office. People are very busy and sometimes it helps if they can go to one place to find the files and information on what they agreed to do. A virtual office today can consists of a blog (check out Word Press at <http://www.wordpress.com>) or Google Apps (located at <http://www.google.com/apps>). A virtual office can be quickly set up and provides a member of the group with the opportunity to be the Office Manager. The costs can be quite low (free to small budget) and yet provide a great way to support action for decisions.

Create Group Follow Up. Agreeing to do something is best supported by reminders and tools that allow people to report back on their progress. TaskAnt is an easy to run program that allows groups to follow up tasks. You can learn more about the program at <http://taskant.com>. You can also create tasks with Google Apps, Open Office, Thunderbird Mail Program or any number of programs that have a calendar or task list.

Your Turn!

An important element in our series on virtual facilitation is learning about perspectives from around the globe. Please share your virtual technology tools or insights you use when supporting IAF Competencies D – Guide Group to Appropriate and Useful Outcomes. Send a 3 to 5 sentence word description of the technology you use, the website location and how to use the technology to support the competency. I will share your ideas in future articles.

I’m away next month; I’ll see in you April when we wrap up the series with a focus on Building and Maintaining Professional Knowledge and Modeling Positive Professional Attitude.

Welcome New IAF Members!

We extend a warm welcome to our colleagues from around the world who joined IAF from January 14th thru February 14th.

(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.

Current Membership from 70 countries: 1208

Australia

Gwenyth Arnold, Victoria

Canada

Lisa Homer, Calgary, AB
Julia Townell, Red Deer, AB
Ken Mullin, Winnipeg, MB
Doug Massey, Burlington, ON
Karin Modotto, Toronto, ON
Connolly Aziz, Toronto, ON
Gil Broza, Toronto, ON
Elizabeth Slawinska, Toronto, ON
Leanne Tait, Yellowknife, NT

India

Uma Sudhindra, Bangalore

Italy

Gabriella Rossi Crespi, Roma
Andrea Stroppiana, Roma
Pier Luigi Ventura, Roma

Jamaica

Elona Grant-Hewitt, Kingston

Nigeria

Adebimpe Opegbemi, Lagos

Norway

Nils-Christian Gross, Stavanger
Tone Haug, Oslo
Christian Valentiner, Oslo

Pakistan

Tahira Yasmin, Islamabad

Philippines

Patricia Lontoc, Makatu

Serbia

Tatjana Obradovic-Tosic, Niš
Tamara Živadinovic, Niš
Suzana Živkovic, Niš

Singapore

Jayan Warriar

Sweden

Kenny Andersson, Stockholm
Yvonne Calme, Stockholm
Anna Fundin, Stockholm
Peter Rindeborn, Stockholm

Switzerland

Susan Kuepfer, Le Solliat

Trinidad

Sarah McIntosh, Trincity

United Kingdom

Kathy Doherty, Redhill
Martin Farrell, Kingston
Katja Gerbhardt, London
Geraldine Mason, London
Nadege Welsch, London
Lisa Westbury, Brighton

USA

Elizabeth Sutherland, Bryn Mawr, CA
Nikki Carpenter, Denver, CO
Paul Cooper, Washington, DC
Debra Helwig, Duluth, GA
Marilyn Kuhn, Indianapolis, IN
Janet Chilton, Carmel, IN
June Miller, Evansville, IN
Darlene Pedersen, Rockville, MD
Norma Hunt, Rockville, MD
Amy Rhode, Farmington Hills, MI
Susan Geller, St Paul, MN
Edie Meissner, St. Paul, MN
Kathleen Bauer, New Ulm, MN
Melinda Guillemette, Corrales, NM
Susan, Zabriskie, Portland, OR
Becky King Scott, Depot, WV

UPCOMING IAF EVENTS

Conferences

12-15 April 2011 - North America

Denver, Colorado

8—9 September 2011 Bangalore India

14-16 October 2011 Istanbul, Turkey

Certification Events

16 February 2011 - Watford, England

12—13 April 2011 -Denver, Colorado

26 May 2011—The Netherlands (Dutch)

5—6 September 2011—Bangalore, India

12—13 October 2011—Istanbul, Turkey

Facilitation Trivia!

Answer: d. All of the above

Alex Osborne described his brainstorming method, developed over the preceding decade, in *Applied Imagination: Principles and Procedures of Creative Problem Solving*, published by Scribner's in 1953. "Brainstorming," like the trademarked names Jello[®], Kleenex[®], BandAid[®], and Xerox[®], has come to be used as a generic term.

For details regarding choice (b), see the 1958 article, "Does group participation when using brainstorming facilitate or inhibit creative thinking" by D. W. Taylor, C. B. Berry, and C. H. Block, published in *Administrative Science Quarterly* (Volume 3, Number 1, pages 23-47). For additional information on brainstorming, see the chapter on "Facilitation of Group Brainstorming," by Paul B. Paulus and Toshihiko Nakui in *The IAF Handbook of Group Facilitation*.