



May 2011

# Global Flipchart

## Member of the Month

Ginger Adams  
USA



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### What is your name?

Ginger Adams

### Where are you located?

Fort Collins, Colorado  
(about 60 miles north of  
Denver)

**How long have you been a member of IAF?** Since January 2006

**Tell us a little about the organization you work for...What is its name?**

### What does it do?

Advantage Facilitation Services (AFS), founded in 2005, is a woman-owned sole proprietor that provides professional facilitation services for value analysis/value engineering (VA/VE), a structured analysis process used to solve problems, create new projects or processes, and/or improve the value of a project or process; design and

planning charrettes; consensus-building workshops; planning; and conflict resolution sessions. AFS offers VA/VE training, with SAVE-approved Module I and Module II training and customized shorter seminars, and is a Registered Education Provider (R.E.P.) with the Project Management Institute (PMI).

**What are your jobs within the organization?** I am the organization! When I ventured out on my own in 2005, after 27+ years of working with and for others, I made the commitment that I no longer wanted to grow a firm or have employees. I pursue work opportunities via sub/prime relationships, joint venture relationships and, on

occasions when it makes good sense to do so, as a prime. My experience is that operating in such relationships presents a strong team to prospective clients and, even more importantly, helps me continuously learn from colleagues and refine my ability to collaborate more effectively.

**How do you use facilitation in your line of work?** My primary work is facilitating groups through various processes. I learned facilitation by experience, by virtue of becoming a Certified Value Specialist (CVS) via SAVE International in 1990. A CVS is someone who intimately knows the VA/VE processes, facilitates teams through those processes, and teaches the VA/VE methods to others.

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monthly newsletter

Karyn Dumble CPF and Sharon Cathers, Editors

## Member of the Month Continued:

I became very good at facilitating these workshops to the point that my clients would request my services to facilitate other types of meetings and problem-solving sessions. It wasn't until I discovered IAF in late 2005 that I learned there was a whole world out there of facilitation skills, tools, techniques, books, methods and, even more important, people willing to share their knowledge of all this! I realized, for the first time, that even though a CVS is primarily a facilitator, there is no facilitation training required to achieve the certification. Since my first IAF conference, in 2006 in Baltimore, I have continued to learn more and more facilitation techniques that have only helped me improve what I had been doing for 20 years prior.

### **Share a recent facilitation experience – what did you do, how did you do it, with whom did you do it?**

**What:** Made a mid-stream course change to generate meaningful results for a client who didn't really know going in what it was they wanted coming out

**How:** Modified the way we use function analysis, a tool specific to the value engineering (VE) process, to stimulate discussion among the project development team (PDT)

A couple of months ago I had a client who requested a value engineering study for a watershed project that was in the feasibility study stage. Value engineering is a structured process used to achieve balance between required functions, performance, quality, and scope with the cost and other resources necessary to accomplish those requirements.

The PDT had identified seven potential project scenarios, comprising 26 specific features, to address the risk of floods in the area. They wanted a VE study to help resolve which one(s) or combination(s) thereof would most effectively minimize future problems. The challenge: they wanted the "VE study" in one day – this is not possible. My co-facilitator and I conducted a planning session with their entire project development team via conference call. We discussed the client's expectations for the workshop,

what was possible in one day, what we could add to that in a two-day workshop, and how long they would need to complete a VE study if that was, in fact, what they wanted. Ultimately we scheduled a two-day workshop, prepared the agenda for what was discussed in the planning session (renaming it a "modified VE study") and arrived on site at the appointed time.

First, not all of the client's team appeared as expected. Three hours into the workshop my co-facilitator and I clearly recognized we'd gone as far as we could go in the direction the client *thought* they wanted. So we spent the lunch break redesigning the session, and redirected efforts for the remainder of the two days to bring about useful outcomes. We created a matrix to relate all 26 elements of the 7 project scenarios to 9 project functions the team had identified during the first morning. For each project element, the team discussed whether it would improve, degrade, or not affect the project functions. It took several hours, but after completing that exercise, the project team and their consultants had a much higher confidence level in their prior decisions. Before the workshop ended, the team created an action plan to meet an upcoming deadline that would determine their project funding.

**If you could share one thing you've learned with other facilitators around the world, what would it be?** No matter how good you are at what you do, there is *always* room for improvement!

**Ginger, thank you for sharing a bit about yourself and your experience with us!**

## A View from the Board



Hello Facilitators!

My name is Sharon Almerigi and I am the IAF Regional Director for Latin America and the Caribbean. I live on the beautiful island of Barbados which is about 150 miles from South America. Some of you visited the island during the IAF 2009 Barbados Conference.

I am director of a huge region where facilitation is an emerging profession. Therefore my mission has been to connect this part of the world with the best thinking of the art and mastery of facilitation that the IAF embodies. Although about five languages are spoken in the region a majority of inhabitants speak either English or Spanish. Therefore, some of our projects have included a bilingual (Spanish and English) newsletter and website, teleseminars and the promotion of local facilitator groups (potential IAF Chapters) in places like Jamaica, Trinidad, Colombia and Argentina.

I first joined IAF in 1995 and was so impressed by the style and sophistication of conferences that I attended annually and earned my CPF in 2001. I was highly honored to be asked to join the Board of Directors in 2007 by the then-Chair and my mentor, Eunice Shankland. Collaborating with an international group of talented and dedicated facilitators has been an incredible experience.

Serving under difficult financial times and with an emphasis on fulfilling its global mandate has been challenging for the Board. Nevertheless, we are making steady progress as we seek to uphold the collegial spirit and best practices in facilitation, diversify its services and maintain the high quality standards of this evolving membership organization.

Due to the global nature – when we meet monthly some of us are in daylight and others in deep night. Under the direction of our new Chair, Martin Galbraith the board has created a business plan and strategies (forged in London in January) that we use to track our actions and goals (See View from the Board, Daphne Cant, Global Flipchart April edition for the strategies <http://www.iaf-world.org/index.aspx>). Minutes of the latest Board meeting of May 12th will be posted to the members' section of the website soon.

### Vista desde la Junta Directiva

Hola Facilitadores y Facilitadoras,

Me llamo Sharon Almerigi y soy la Directora Regional de la IAF para América Latina y el Caribe. Vivo en la isla hermosa de Barbados, en las Antillas Británicas, la cual está a como 150 millas

de la América del Sur. Algunos de ustedes visitaron la isla durante la conferencia IAF de Barbados en 2009.

Soy la directora de una región muy grande donde la facilitación es una profesión en el proceso de desarrollarse. Por lo tanto mi misión ha sido conectar a esta región con los mejores conocimientos del arte y facilitación del IAF. Aunque se hablan cinco idiomas en la región la mayor parte de los habitantes hablan inglés y español. Por lo tanto unos de nuestros proyectos han incluido un boletín y un sitio de Web bilingüe, teleseminares y la promoción de grupos facilitadores (potenciales capítulos de la IAF) en lugares como Jamaica, Trinidad, Colombia y Argentina.

Cuando me asocié con la IAF en 1995 estaba muy impresionada con el estilo y el nivel de sofisticación de las convenciones así que asistía año tras año, y conseguí mi certificación de Facilitadora Profesional en 2001. Recibí el honor grande de ser invitada por la Directora, y mi mentora, Eunice Shankland (una de la fundadoras de la IAF), a ser miembro de la junta directiva en 2007. La experiencia de colaborar con un grupo de facilitadores tan talentosos y dedicados ha sido increíble.

Manejando la IAF en una época de recesión económica, tratando de cumplir con su mandato global ha sido un desafío grande para la Junta Directiva. Sin embargo, hacen progreso paso a paso trabajando para mantener un espíritu agradable de solidaridad y las mejores prácticas de facilitación, para diversificar sus servicios y para mantener las normas de calidad más altas para los miembros de esta organización en proceso de evolucionar.

Debido a su alcance global – cuando nos reunimos cada mes, para unos es de día y para otros es noche profunda. Bajo la dirección de nuestro jefe nuevo, Martin Gilbraith, la junta directiva ha creado un plan de negocios y estrategias (creado en Londres en enero) que se usa para seguir nuestras acciones y metas (vea Global Flipchart <http://www.iaf-world.org/index.aspx> 'View from the Board', edición abril para las estrategias). Las actas de la última reunión será poner al 'sección de los miembros' (ingles) del sitio web muy pronto.



# The Virtual Connection

## *Keeping the Group online*

### *“Build and Maintain Professional Knowledge*

### *“Model Positive Professional Attitude”*

Up to this point in the series, I have focused on linking tips with technology to support virtual facilitation work. IAF Competencies “E – Build and Maintain Profession Knowledge” and “F – Model Positive Professional Attitude” provide a framework for continued self-reflection in order to improve and strengthen one’s professional practice. I believe there are one or two tools facilitators can use to support their professional development. This month, I have pulled together three tips to help in the area of ongoing professional development.

## **Tip #1 – Use the Competencies as Business Map for Practice**

I like to study the work of various professions and I am fascinated by people who work on various aspects of home construction. When I watch them work, they appear to have a way to make things fit, look good and get the job done. When I talk to them, they often reveal they have a “system, process or method” that really works to ensure the work completed will match the expectations of the homeowner. In a nutshell, they have a process, a plan, and the skills to carry out the plan.

As a facilitator, I take a great deal of pride in the fact that facilitators have a process. **Figure 1** is a logic model of the IAF competencies with the code of ethics at the start of the process. The logic model, when read left to right, represents the basic process facilitators use in our day-to-day work with clients. The client experiences dealing with a person or team with well-defined ethics, a willingness to listen to their needs, can identify processes to engage and involve the group, provide a meaningful facilitation experience, support the group in achieving meaningful results and demonstrate willingness for professional development. The ability of the individual to create the plan, select the right process and carry out the work represents the strengths of facilitator.

IAF Facilitator Competencies - Four Building Blocks in Professional Development

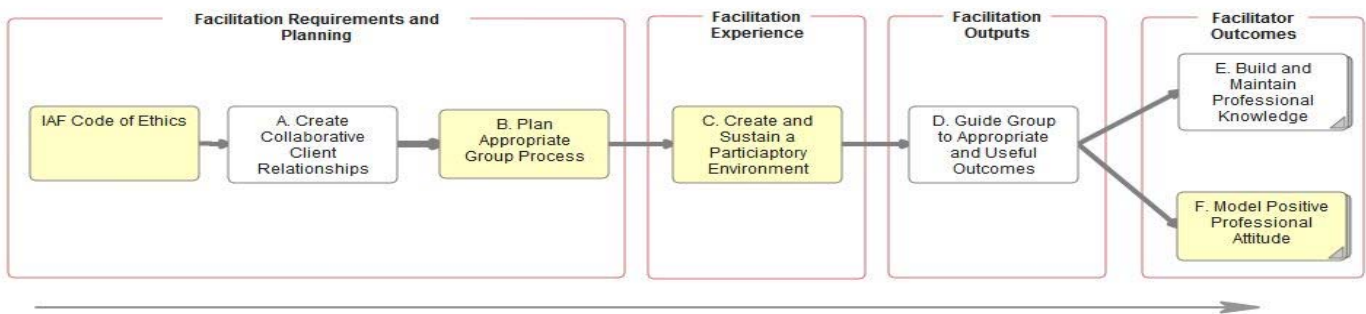


Figure 1- IAF Ethics and Competencies

Using the competencies as a business map is an excellent opportunity to:

- √ Identify if all the process steps were followed.
- √ List what went well from your perspective.
- √ List what went well for the client and the group.
- √ Identify a challenge or difficulty you or the group experienced in the process.
- √ List what you learned about yourself and your practice from the experience.
- √ Identify what you could do different next time to improve practice.

Learning from each facilitation experience using the IAF competencies is a consistent method to develop profession practice.

### **Tip #2 - Keeping a Learning Record**

In order to really benefit from the answers to the questions, writing them down in a diary can be helpful. There are wide variety of electronic diaries you can use for Windows, Mac and Linux. One example is from the team at Spinterware for Windows. Idailydiary (<http://www.spinterware.com/tour/identitydiary.htm>) is a solid computer-based program that can operate on a USB device or your computer as a diary. The software provides a clean blank page where you can make notes about your daily experiences. If you like structure instead of blank page, **Figure 2** is a template you can use to record your reflections from a facilitation process.

Journal Entry	
Facilitation Event:	Date:
Number of People:	Number of Event Days:
Location of Project Files on my computer:	
Questions	My Answers
Identify if all the process steps were followed?	
What went well from your perspective?	
What went well for the client and the group?	
What a challenge or difficulty you or the group experienced in the process?	
What is something you learned about yourself and your practice from the experience?	

**Figure 2- Journal Entry Template**

The steps in the reflection process include:

- a) Print out the IAF competencies or use Figure 1.
- b) Look at the documentation you have on file for each of the IAF competencies.
- c) Use the Journal Entry template in Figure 2 to log your experience in the “My Answers” column by reflecting on the entire experience using the competencies
- d) Repeat steps (a) through (c) with each facilitation experience.

If you use a Mac computer or the Linux operating system, you can complete a Google Search to find a diary software program that will work for your system.

### **Tip #3 – Learning from your Diary**

Professional development is an opportunity to reflect on practice and identify opportunities to improvement. A diary with a number of journal experiences is a concrete place to start the analysis of current practices in order to identify a professional development plan. The following is a series of steps to translate journal entries into a personal plan of action for a specific IAF competency.

- a) Review the last seven facilitation process identified in your journal.
- b) Read through the journal entries.
- c) Make a list of what went well, challenges and areas for further development.
- d) Check your list against the IAF competency map (Figure 1).
- e) Identify the one competency where you would like to focus your next professional development activity in response to the list identified in (c)
- f) Make a plan identifying what you will do in order to strengthen your practice in relationship to the identified IAF competency.
- g) Document your plan in your journal and in your date book

Documenting a plan is a helpful step to ensure your professional development activities will completed.

Finally, repeating the sequence above after each set of seven facilitation engagements will enable you to build an ongoing professional development plan with a record of accomplishments documented.

### **Wrapping up!**

Virtual facilitation remains an emerging opportunity to engage diverse groups through the use of the Internet and software tools. We have explored how align virtual facilitation activities with the IAF Competencies. I encourage everyone to find a colleague and explore the opportunity to incorporate virtual facilitation in your practice. It is and remains the opportunity to engage people in the possibility of change.

Thanks for the opportunity share.

I hope to see you online!

Jerry Mings

## Welcome New CPF's!

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**Welcome to our newest CPF's who were certified in Denver, April 12th and 13th.**

### **Australia**

Michael Walsh CPF, Richmond  
Bevan Bessen, CPF, Fremantle

### **Canada**

Sheila Beauchemin, CPF, Victoria, BC  
Melissa J. Hadley, CPF, Victoria, BC  
Sharmila Setaram, CPF, Mississauga, ON

### **Japan**

Cathy Bernatt, CPF, Toyko

### **USA**

Elizabeth Sutherland, CPF, Bryn Mawr, CA  
Ron Milam, CPF, Los Angeles, CA  
Rich Wilson, CPF, San Francisco, CA  
Susan Stalick, CPF, Boulder, CA  
Paul Cooper, CPF, Washington, DC  
Elise M. Bouchner, CPF, Lafayette, LA  
Ann Weaver, CPF, Stennis, MS  
Susan Carter, CPF, Cattaraugus, NY  
Paige Ireland, CPF, Alexandria, VA

*Thank you*

*Bernie Fredette*

**OFFICIAL PHOTOGRAPHER FOR**

**IAF NORTH AMERICA CONFERENCE 2010 AND 2011**

Bernie has generously donated his time, money, and effort to be the official photographer for the last two IAF North America conferences. We thank him for his outstanding service, good humor, and constant smile as he captured the spirit of camaraderie we all experienced.



## IAF Board Nominations and Election Process for 2011

Dear IAF members,

### Your IAF needs you! Announcing the IAF Board nominations & elections process for 2011

Please get in touch if you are interested to get more involved with IAF, to help the Association to grow and better serve its members and the facilitation profession. We are now inviting members to volunteer to serve on this year's IAF Board nominations & elections committee - **deadline May 31st**. Please see below for details, and please get in touch directly with any queries.

Last year IAF launched a new online, global Board nominations and elections process to bring greater openness, transparency, and democracy to the IAF's leadership and governance. That process resulted in the election and re-election of members to 10 of the 16 Director positions on the IAF Board, and the strong and committed Board we have today. For details of the Board positions and members presently serving, see:

<http://www.iaf-world.org/AboutIAF/BoardofDirectors.aspx>

This year's process will be largely the same as last year's, but with a few tweaks based on last year's experience - and several months earlier in the year, to allow more time toward the end of the year to involve both incoming & outgoing Directors in induction and planning for next year. The slightly revised 2011 Board Nominations & Elections policy, along with IAF's Bylaws and other key policies are at <http://www.iaf-world.org/AboutIAF/ByLawsandPolicies/Policies.aspx>

The first step is to establish a 2011 Board Nominations & Elections Committee of 3-7 members in June. The committee will oversee the process and ensure that it is fair and transparent. It will then announce the vacancies and invite nominations from members for Board positions. The aim is to hold the election in September and have the process complete and the results announced by October.

The Board is particularly keen that the Nominations Committee, and the Board itself, reflect as far as possible the diversity of the IAF membership and the facilitation profession, as well as bringing the appropriate skills and experience to the roles. So please consider whether you would be willing to volunteer to serve IAF in this way!

Five of those members that served on the 2010 committee have already expressed a readiness to serve again this year if needed, so it should be possible to have a 2011 committee of members with direct experience of the 2010 process, as well as new members with fresh perspectives and additional expertise.

Four members of the 2010 committee have written something of their experience of serving, and why you might consider putting yourself forward this year:

*"As Chair of the 2010 Nominations Committee, I would encourage all IAF members to consider joining the Committee this time around. It's a perfect way to learn more about how the Board operates, to support*

*the Association's leadership process, and to explore potential opportunities for greater involvement for you in the IAF's governance down the road. With an effective Committee in place, all members share the work and it amounts to a time commitment of a few hours a month, over the course of the elections process. Serving the organization in this way is a chance to connect with more of your IAF colleagues and to deepen your returns from belonging to an international organization."* - **Julie Larsen**

*"Over the years, the IAF has used a series of procedures to ensure a broad spectrum of Board members. This ranged from quite formal to relatively informal. For 2010/11, the process was formalized with the creation of a new committee. Policies for vetting each candidate were established and individuals were encouraged to nominate or self-nominate where there was a dearth of candidates. The process worked extremely well and a formal policy was being put in place to ensure its continuation. The nominations role is clear, straightforward and not too time consuming. Individual members work as part of a small team so no one person has to carry the full burden. I would encourage others to become involved in this vital function for the future of the IAF."* - **David Wayne**

*"Being a member of the Nominations Committee in 2010 gave me first exposure to work with other IAF members on a global level. It was an excellent opportunity to learn more about our Association, its structure and purpose, in particular while reviewing the job descriptions for the roles that were open for election, and shaping the election process. Personal learning happened in the interaction with other members and previous board members. And I was glad to be able to give back and contribute to the future of our Association!"* - **Ulla Wyckoff**

*"Serving on the IAF Nominating Committee last year was actually fun - mainly because as seems to be true with all IAF activities, I met new facilitators who are doing lots of exciting things. I followed up on a number of the references which gave me an opportunity to talk to people around the globe and hear them praise the various candidates while they explained the variety of projects they have been working on together."* - **Linda Mather**

Do please let me know if you may be interested, or if you have any queries. I look forward to hearing from you, and thank you for your support and commitment to our Association and our profession.

With best wishes,  
Martin Gilbraith, IAF Board Chair  
[iafchair@iaf-world.org](mailto:iafchair@iaf-world.org)

## Method of the Month

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

### Instant Service Development

**Objective:** To warm up a group's creative thinking abilities.

**Steps:**

1. Divide your group into teams of 3 – 5 people.
2. Ask each individual to write two random common nouns each on a post-it. Remind them perhaps that a noun is a person, place, animal, concept or thing. Ask them not to use proper nouns like Casablanca, Pepsi or Jackie Chan. Common nouns are words like: goldfish, cellulite, wisdom, propeller, meadow, communication, fisherman, etc.
3. Have the participants stick all of those post-its onto the wall, a whiteboard or a flipchart.
4. Ask each team to send forward one member. The member stands with his or her back to the post-it display and selects three words.
5. Assign the teams to take 10 to 40 minutes (depending on how much time you have) to devise a new service which employs all three of the words they have chosen. They should give their service a name, and then, according to the time you have available and the sort of group before you, have them design a sales poster, and/or a list of the new service's benefits, and/or a sales presentation, and/or a target market, and/or an outline of a business plan.
6. Debriefing:
  - a. Teams each present their services.
  - b. What did your team do to make decisions?
  - c. What was difficult for you in this assignment?
  - d. What was easy?
  - e. What sort of thinking is going on here?
  - f. What tips do you take away from this exercise for our creative thinking today?

*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)*

## Welcome New IAF Members!

*We extend a warm welcome to our colleagues from around the world who joined IAF from  
April 15th thru May 15, 2011*

*(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: 1154**

### **Barbados**

Mobola Aguda-Forde, Bridgetown

### **Belgium**

Bernard Peeters, Ternat

### **Canada**

Elizabeth Keurvorst, White Rock, BC

Maureen Dunne, St. John's, NF

Bruce Tawse, Bedford, NS

Robert Sabourin, Manotick, ON

Brodie Church, Mississauga, ON

### **Finland**

Manelius, Kirsi, Espoo

Lahdelma Maj-Lis, Espoo

### **France**

Meryem Le Saget, Paris

### **Peru**

Catalina Quiroz, Lima

### **Russia**

Alex Brazhnki, Moscow

Liudmila Yurievna Dudorova, Moscow

### **Sweden**

Christine Kiliam, Skanör

### **Singapore**

Denise Pang

Simone Vaz

### **Turkey**

A. Berna Muderrisoglu

Yekta Ozozer, Istanbul

Merih Tangun, Istanbul

### **Trinidad**

Cheryl McKenzie Cook, Diego Martin

### **United Kingdom**

Gaynor Mears, Cambridge

Allan Russell, Exeter

### **United States**

Milo Zarakov, Alamo, CA

Julie Donnelly, Cambridge, MA

William Vanderwall, St. Paul, MN

Jeannie Zieger, St. Peters, MO

Marc Otterback, Ashburn, VA

Catherine Erickson, Woodbridge, VA

## UPCOMING IAF EVENTS

### Conferences

8—9 September 2011—Bangalore, India

14-16 October 2011—Istanbul, Turkey

9 -12 May 2012—Halifax, Nova Scotia, Canada

2012—Melbourne, Australia

### Certification Events

26 May 2011—The Netherlands (Dutch)

5—6 September 2011—Bangalore, India

12—13 October 2011—Istanbul, Turkey

29-30 October 2011—Kennesaw, Georgia

17 November 2011 -The Netherlands (Dutch)

What was the worst meeting venue you have ever had to work in? Send your anecdote to [globalflipchart@iaf-world.org](mailto:globalflipchart@iaf-world.org) for inclusion in an upcoming issue.