



Facilitation/Training Case Study

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Client: Natural England - Transformation Management team
Sector: Public Sector
Context: <p>This was a combination of the Collaborative Leadership course and a full Participatory Strategic Planning (PSP) process. The Transformation Management Team was helping the organisation to undergo a strategic change and had been given the task of getting the teams on board with change and taking responsibility for that change. The participants were senior staff wanting both a plan and some methods to move the transformation forward.</p> <p>A few of the staff had been involved in Group Facilitation Methods (GFM) training previously, and one saw the Collaborative Leadership Course advertised and felt this might be the right step for this team. They contacted Ann and we arranged the course/strategic planning.</p>
Participants: <p>13 senior/middle managers (down to 12 due to illness at end)</p>
Length of Intervention: One year <ul style="list-style-type: none">• Three online video conferences to discuss leadership topics (videos) over 5 weeks• One 3-day PSP course/facilitated session resulting in a full Strategic Plan• 6 x 2-hour Action Learning Sessions, one occurring every 6-8 weeks• Several individual coaching sessions
Rational Aims: <ul style="list-style-type: none">• To develop a collaborative leadership style through exploration of values and motivations and approaches• To enhance skills and knowledge in motivating, enabling and getting the best from teams and partners through use of models, tools and methods• To create a workable plan that addressed the challenges of transformation.• Understand different leadership styles and approaches – focusing on Solutions-Focused collaborative leadership• Build a set of tools and methods that support the leader's ability to lead, and others' ability to act
Experiential Aims: <ul style="list-style-type: none">• To build self-awareness of the leadership journey and self-confidence through practice, reflection, and actual project work if desired.

- Develop clear understanding of participants' own styles and values – what works that will support their teams and partners
- Develop skills in motivating others – develop a vision that inspires and enables others to work at their best

Main methods used:

Stage One ...

Initially, participants are asked to watch videos and read materials selected to highlight Leadership Principles as defined by Kouzes and Posner (The Leadership Challenge), keeping some reflective notes along the way... The Principles:

- Model the Way
- Inspire a Shared Vision
- Challenge the Process
- Enable Others to Act
- Encourage the Heart

3 Online 90-minute Focused Conversations were held to get everyone thinking about leadership and collaboration.

Stage Two...

Mainly the PSP but with emphasis on Focus Question (Natural England decided themselves on a focus question about what a collaborative organisation would look like), the Vision Consensus Workshop, and with the addition of the Principles reviewed along the way. We used OSKAR Coaching and NEED Feedback models to support collaboration.

Stage Three...

Action learning Sets (ALS) – group sets (with training in facilitation skills needed) to support the projects that the participants have designed to put their leadership skills into practice.

To what extent did the event succeed in meeting the intended aims? (short term)

This modified version was tightened up, with some shift to online, from an 8-day version Ann has run for both Communities First in Wales and earlier for Engage East Midlands in Nottingham. This made the course more affordable and workable in terms of both time and money.

I believe the group has been very happy with the course and Action Learning Sets (ALS). I would have loved to extend the face-to-face time and practice (maybe 5 days instead of 3), but in austere times, the shorter face to face and extended learning through virtual ALS seems to have hit the right note.

In the medium/longer term (e.g. 3-9 months) what is the overall impact of the event?

The Action Learning goes on, and those who have chosen to continue find the support invaluable. The methods have been used in many different ways across the organisation to engage teams, to make plans, to coach staff during tricky times. I am still occasionally providing coaching for some of the participants.

What participants say...

RM: In terms of benefits of the course/workshop for me:

- *Realising what leadership is and isn't (different to what I'd assumed/been told before) and how collaboration can make a real difference in terms of leading effectively – applying this in the way I work and build teams*
- *Being introduced to video-conferencing as a way to run training sessions where F2F isn't practical (will be invaluable over the next few weeks, I think!) and I really liked the approach of having a couple of short videos to look at before and then talk through.*
- *Continuing our action learning group to discuss issues. We are now going back to the question of collaboration in the organisation and how we might be able to drive that, having had to 'park' it for a bit following our initial attempt to crack it.*
- *Getting some more approaches for coaching and facilitating to add to my 'toolkit'.*
and

JE:

- *Suite of tools to use with teams, and more importantly, the confidence to use them – which I have on a number of occasions, with success*
- *I:I coaching has been complementary to the action learning sets*

DD:

The thing that has really stuck with me from the course more than anything was not the actions themselves (although these are useful) but the “sticky wall” methodology for collecting ideas/issues and clustering these, which can work at any level and is a great way of casting the net quite widely initially, and then rapidly getting into the convergent phase of brigading/focussing ideas to come up with a coherent and manageable action plan. I have since seen this approach used to great effect in a couple of workshops. I have also benefitted from participation in the subsequent ALS sessions, in providing both the space and the network (of colleagues) to work through some key items.

Ann comments: I think that the benefits reflect more on the training elements than the workshop in that the group were then sort of dismantled as a group afterwards, but they did then go on and really use the tools as they had sense what it could do for them....I am also now running a 'mini' version of this for a particular department team at NE.

The story as narrative:

Stage 1 was great – everyone engaged with the materials and we had quite comprehensive conversations about the video talks. When each video was assigned, participants were also given a base list of focused conversation questions so that they had a way to take notes. It was a great way to get people engaged in the course and topics in advance, a great way to get to know everyone a bit before the intensive 3 days...on the third session we walked through the Focused Conversation as a method...

Stage 2 as an extended PSP – we spent additional time up-front looking at the focused conversation and also more time dissecting (full walkthrough) the first Consensus Workshop (the vision) of the PSP to ensure they had the deeper learning. A key element was that they designed the Focus Question for the PSP – this was a challenging exercise, but it meant that the plan they developed had real meaning in the situation, and developed real ownership, and they really understood the significance of that question. They put together a quite comprehensive plan to bring back to the workplace, and felt a bit daunted when they realised what they had developed!!! But we walked/talked that through in the context of real participation, engagement and responsibility – so they were able to 'put themselves in the shoes' of the people they would be collaborating with. We also highlighted how the method

fits the Kouzes and Posner Principles and back to some of the nuggets from the videos, so always focussing on the process as a way to lead and the many facets of that. The additional methods/tools that were added of coaching and feedback enhanced the language of collaboration for them.

Stage 3 – the virtual ALS – we actually held 7 sessions over 12 months, which were reasonably well-attended, and most original participants attended 3 or 4. There were ongoing organisational changes during the year, and all participants are now on different teams as part of restructuring. These sessions gave everyone a real chance to put the tools and methods into practice, and for a while to continue to review the actual plan they created. Due to the ongoing organisational change, the plan eventually became obsolete, but we met through the year and the group continues to meet every few weeks to run their own ALS and provide support for each other.

Key learnings – Ann writes: I am finding more and more that I am providing a combination of facilitation of processes and training in tools and methods (e.g. the Holding Difficult Conversations course is often part of a conflict resolution process for a team or organisation). This is perhaps down at some level to my preferred way of working, but I am also finding it creates more sustainable communities of practice and support networks for participants – they are mostly in-house events, but I believe this is workable in open events as well with people coming for similar reasons or from similar backgrounds.