

# Designing and Facilitating Creative Learning Activities

A Companion Booklet to  
The Barefoot Guide 2  
Learning Practices  
in Organisations  
and Social Change

**This publication was made possible by  
the financial contributions of:**



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2011

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Produced by

The Community Development  
Resource Association (CDRA)



PSO: Capacity Building  
in Developing Countries



Voluntary Service  
Overseas (VSO)



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'Learning isn't a means to an end; it is an end in itself.'

*Robert Heinlein*

'That is what learning is. You suddenly understand something you've understood all your life, but in a new way.'

*Doris Lessing*

'What is important is to keep learning, to enjoy challenge, and to tolerate ambiguity. In the end there are no certain answers.'

*Martina Horner*

'It's not the biggest, the brightest, or the best that will survive, but those who adapt the quickest'.

*Charles Darwin*

'Our challenge. How do we create organisational coherence...how do we create structures that move with change, that are flexible and adaptive...that enable rather than constrain? How do we resolve the need for personal freedom and autonomy with organisational needs for prediction and control?'

*Margaret Wheatley*

'Creative people are uneasy about the status quo; they live on the edge of their competence. They place themselves in situations where they don't know what is going to happen. They accept confusion, uncertainty, and the higher risks of failure, as part of the process.'

*David Perkins*

'Every discovery contains an irrational element or a creative intuition'.

*Karl Popper*

# Introduction

Welcome to this Companion Booklet for the Barefoot Guide. If you are responsible in any way for learning activities in your organisation you are probably reading this to get some ideas of where to start or what to do. This chapter will help you. It's full of ideas and tips, but also some of the thinking that goes on behind the scenes.

But first a few basic guidelines:

- **Learning is not another activity.** It is a process, a thread running through your organisation, not just unconnected events. How can you connect learning and working activities to better serve each other?
- **Start small with what you have.** Often making small changes to existing practices is the best way to begin.
- **Don't push people to learn.** You can inspire people, introduce enjoyable activities and encourage and support people in their efforts to take responsibility for their own learning, but don't force things.
- **Don't look for recipes to copy.** You can borrow ideas but make sure you adapt them to your situation and needs. Try to think up your own ideas and experiment with them. Above all learn to trust your own instincts to ensure that whatever learning activities you develop suit the people and the situation.

**Thirdly, we describe different kinds of learning processes and events, like "Case studies" or "strategic planning".**

Start where you like and see where that leads you. We have made the section headings extra large so you can find them easily

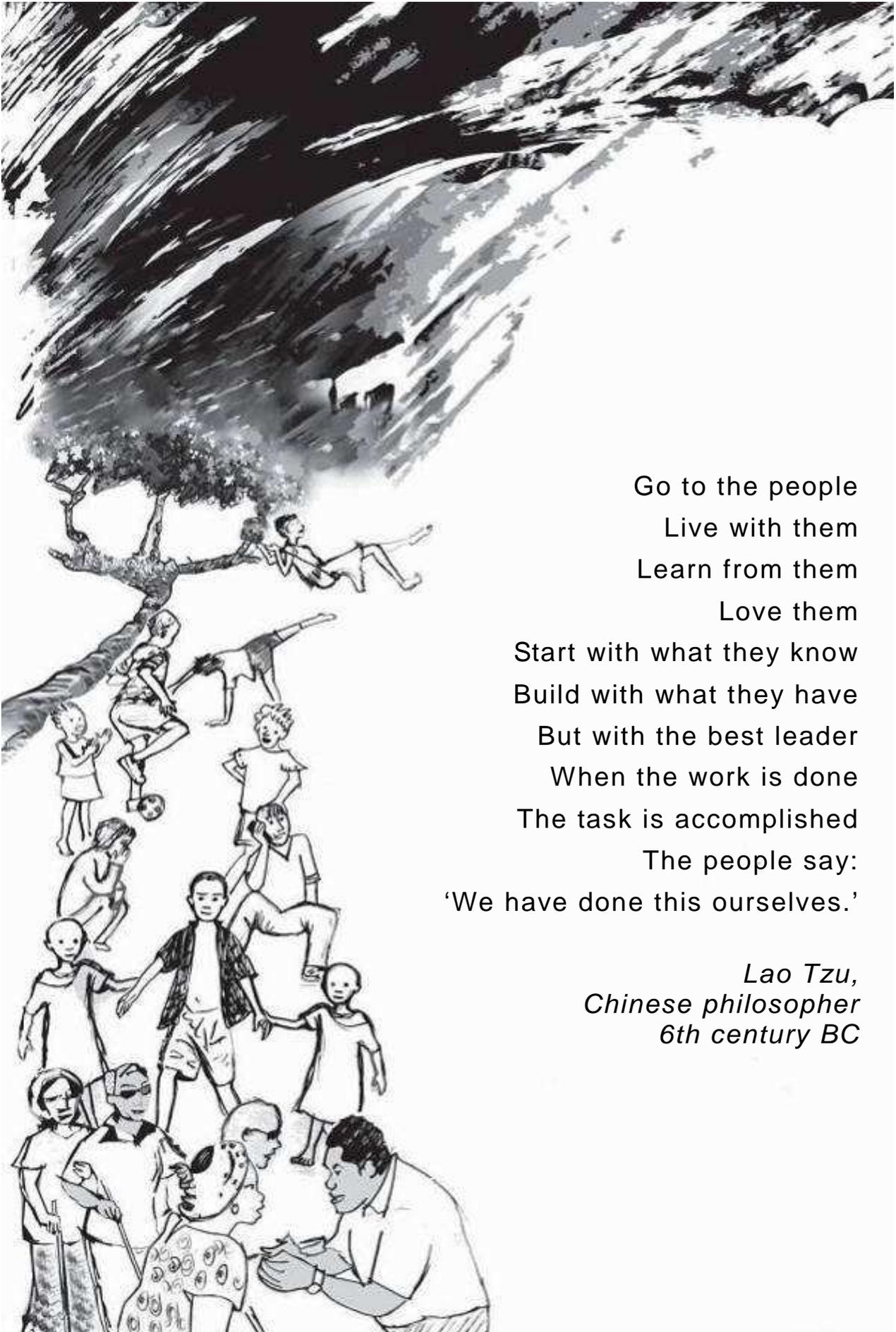


## What is in this Booklet?

We have three windows to look through:

**Firstly some principles** of designing and running organisational learning activities – these are the deeper challenges (like “working with diversity” or “including the right people”) that you need to revisit again and again to make sure that your foundations are strong.

**Secondly we look at typical elements** of many learning process (like “how to begin a process” or “how to ask good questions”).



Go to the people  
Live with them  
Learn from them  
Love them  
Start with what they know  
Build with what they have  
But with the best leader  
When the work is done  
The task is accomplished  
The people say:  
'We have done this ourselves.'

*Lao Tzu,  
Chinese philosopher  
6th century BC*

# A. Principles of Design and Facilitation

## A.1 Include the right people

*It was a great workshop. We came up with a new way of working. We were all excited. But the next day when we went to tell our manager he said we couldn't afford the changes. So now we are back to square one.'*

\*\*\*

*After a long workshop it became obvious to us, as programme managers, that the monitoring and evaluation team would be more effective if they were split up and based in country offices. Their relationships with the field staff would be stronger and the information richer. After the workshop, when we informed the M&E team what we had realised, they totally rejected our suggestion and are now complaining to the union.*

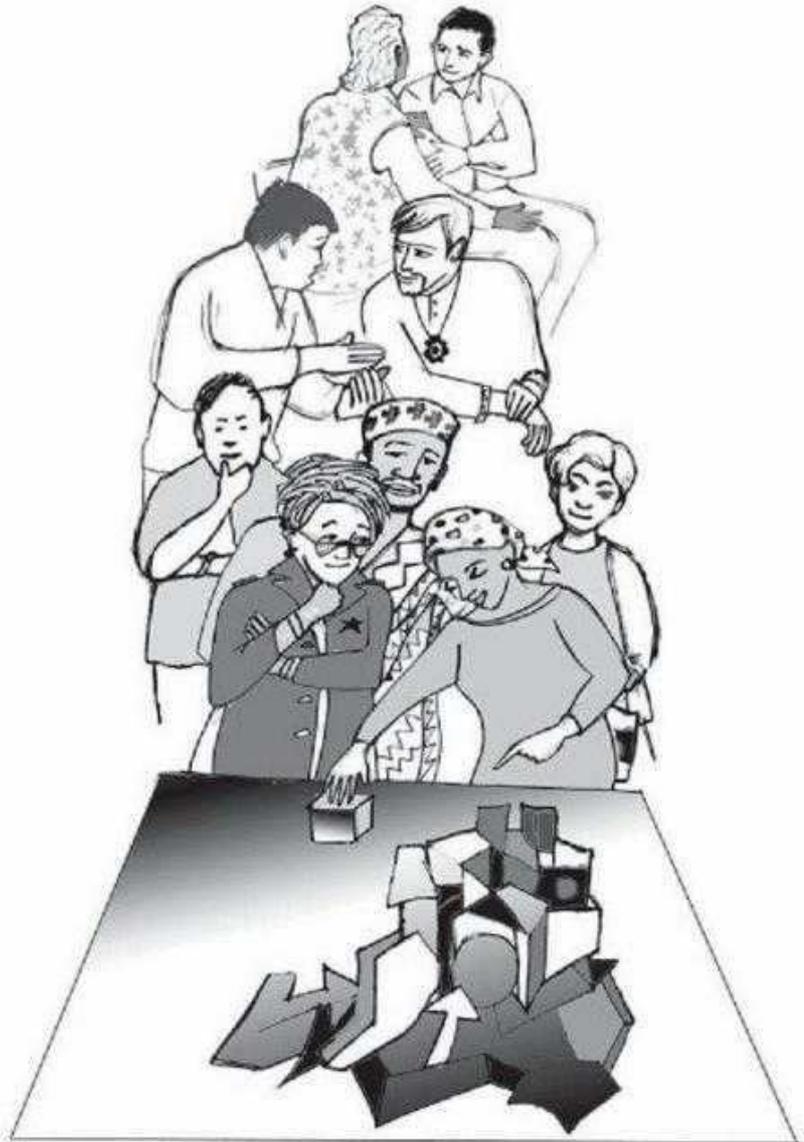
Whether you like it or not, whether you have the time or not, it is crucial to involve the right people in a learning event or process, or you too could 'end up back at square one'. But how do you know who should or should not be there?

The *purpose* of the activity should be your main guide.

What do your values and principles say about participation and involvement? Who has important information and who will be affected by the issues? What will happen if you do not invite certain people? Who can offer useful or different ideas?

### **"Nothing about us without us!"**

This is a slogan and a principle from disability movements tired of other people coming up with solutions to their problems without fully involving them. Those affected by any changes



need to be involved in the process – both because it is morally right and also because it makes common sense to seek guidance, ideas and leadership from those most affected.

### **"Whoever comes is the right people"**

This principle from Open Space Technology is put into practice through an open brainstorm. It aims to enable groups to freely discuss questions and ideas that really matter to them, and from which they may kick-start new

projects. Often, the aim is to find people who will champion an idea and bring their enthusiasm and commitment. You don't want to force people to come who are not interested, who would rather be somewhere else. They

may drag the energy down and pour cold water on the idea.

### **Get the whole system in the room**

This is a principle we hear more and more these days. If we want holistic, integrated and sustainable change we need to get everyone in the room, everyone who is involved or affected in any important way. This builds on 'nothing about us without us' to include a wider range of contributors.

### **Build confidence before engagement**

Sometimes people who are not confident of their own power need some space to meet together to discover what they think, feel and want for themselves. This enables them to prepare before they meet with confident people or groups, so that they can engage on a more equal footing.

Participation doesn't necessarily mean having everyone in the same room together at the same time. Often people need a safe place to express their ideas and feelings. In hierarchical organisations, it may be better initially to speak to people individually or in peer groups. Once you get an idea of they are thinking you can design the next stage of the process in a way that will enable big issues to be raised without causing loss of face or resentment. Learning processes can help to break down hierarchies but this takes time and careful thought.



## A.2 Explore 'the whole elephant'

### What's an Elephant?

Once upon a time, there lived six blind men in a village. One day the villagers told them, "Hey, there is an elephant in the village today." They had no idea what an elephant was. They decided, "Even though we would not be able to see it, let us go and feel it anyway." All of them went to where the elephant was. Every one of them touched the elephant.

"Hey, the elephant is a pillar," said the first man, who touched a leg.

"Oh, no! it is like a rope," said the second man who touched the tail.

"Oh, no! it is like a thick branch of a tree," said the third man who touched the trunk of the elephant.

"It is like a big hand fan" said the fourth man who touched the ear of the elephant.

"It is like a huge wall," said the fifth man who touched the belly of the elephant.

"You're all wrong," said the last man, "It's large and hot, smelly stuff comes out of it."



### What's a client?

We were neatly divided into three different programme groups, each with our own funding sources and reporting requirements and our own team dynamics. So we focused on our own programmes, ignoring each other's work. But we often had the same clients. Sometimes we would meet our colleagues at the client organisations, not really knowing what each other was doing there.

*One day, our manager announced that we would have meetings based on client organisations, instead of programme meetings. You could almost hear the collective groan.*

*At the first meeting, focused on one shared client, each person had to explain the work they had been carrying out with that client.*

*The first person shared their programme objectives and main activities. But when they began explaining the difficulties they were experiencing, a hush came over the room.*

*As person after person spoke, a much richer picture of the client organisation started to emerge. The stories built on each other and fresh insights began to bounce around the room. It was marvellous to see everyone doing their best to deepen their understanding of this client organisation – and also to hear laughter and notice knowing smiles.*

*These meetings became regular, always resulting in new insights only made possible by the different inputs. Indeed, it also enabled new kinds of learning conversations throughout the office."*

When working with systems and complex situations, if we only deal with problems or specific parts, we may miss the root causes of the problem or we may fix one part, only to find this has a negative effect on another part. We may spend time trying to address issues that could more easily be addressed elsewhere.

Mapping systems and people and exploring relationships between them can be very helpful in making sure you are not missing information and input. Often it is the relationships that need work, rather than the separate parts of the system.

## A.3 Work with the whole person - head, heart and feet

We can't work with half a person! If we want to work holistically, if we want to engage with the whole person, the whole team or the whole organisation then we have to think about what we are neglecting, where we need to pay more attention.

So often learning is taken to be only about facts and figures, thinking, ideas and theories, opinions and thoughts – you know, *head level* stuff. These things *are* critical to being clear, scientific, intelligent and strategic.

But what we think is not the only thing that makes us human. Imagine if we had no emotions? In a way we would be little more than walking computers. Our emotional life, our *heart level*, is a key part of who we are – we experience and respond to the world through our emotions, as much as we do through our thoughts. If you want to really discover what is important to someone, whether experiences or thoughts, one way to do this is to find out what they feel, to follow their emotions. Emotions are strong clues to discovering what matters.

But at times you need to dig even deeper than emotions to a hidden level where our true motivation, will, or energy lies. This is the *feet level*. (Have you heard the expression, 'They voted with their feet'? It means: they walked out, they left because they wanted to!)

Sometimes when we are trying to understand why something happened, in order to learn from it, we may be puzzled because things just don't make sense at a head or a heart level. For example, the community leader said that she and the others supported the project, for all the reasons you had discussed with them, and expressed happiness and appreciation for your interest. But when the time came to do the work, no-one arrived; no-one really had the energy or will. It had made logical sense to them to be involved (your plan was good) and everyone was friendly, but actually it was not that important to them; there were other priorities. So what was their motivation? Perhaps it was to be agreeable, not to offend you, so they happily went along (their heart level, emotional response), maybe not consciously realising themselves that they were not so interested. This disinterest was at their feet level, their 'will' response.

What you have  
Is a blundering mind.  
What you are  
Is a learning heart.  
*Sri Chinmoy*

### Head Level Learning

This involves collecting good information and thinking logically about what happened in order to develop knowledge, theories and ideas.

### Heart Level Learning

When learning from an experience, we pay attention to the emotions or feelings that were part of the story, looking for how these guided thinking and doing. This also applies to the feelings of the person listening and learning. Do both people feel safe to speak honestly, to share what really happened, without fear of being punished?

### Feet Level Learning

Often we cannot really understand and learn from an experience until we uncover the will, the different motivations and energies that drove the situation. What did people really want? This also applies to the learner – do they really want to learn?



## A.4 Appreciate and encourage diversity

In the context of a learning process, diversity means the varied types of cultural experience, acquired skills, natural talents and physical and mental ability that people bring to the learning event. If we do not consider this and unconsciously prevent people from participating fully then we are limiting how much learning can take place.

In a multi-cultural organisation or learning process it is common for meetings to be run in a “modern” way, with a pre-planned agenda and a debating style that allows those with strong opinions to dominate and enables quick movement to action. But other cultures often value different ways of meeting that give more attention to relationship-building, dialogue and inclusion. It is important to find ways of meeting that suit both the purpose and the participants.

You can find out as much as possible about the people who will come to your learning event. And you can create the conditions that will enable them to participate.

Here are a few simple suggestions:

### Before the event:

- Ask if people need anything in order for them to fully participate or if they have any particular requirements for food or amenities.
- Ask people what previous experience they

have had and what skills they can bring.

- Check that the event will not be held on an important religious or cultural festival that might prevent some people from attending.
- Choose a venue that is as accessible as possible.

### During the event:

- Don't make assumptions about what people can or can't do – ask them.
- Have alternatives for people who might find some activities difficult or inappropriate – for example modelling clay instead of drawing materials for someone who is visually impaired.
- Ask people individually if they have anything to contribute – especially those who are quiet.
- Listen to people's opinions respectfully. Try to understand why they might hold them.
- Try to create an atmosphere where everyone is listened to and people's views are acknowledged, to enable people to overcome any barriers they are facing.

### After the event:

- Get feedback afterwards so you can learn from the experience; you may inadvertently have excluded people.



## A.5 Help people to find common ground

There is huge diversity in the world and we must appreciate and work with it. But there is also huge commonality. We may be different and want different things but we are human, we all need to feed our children, to live in peace, to be free of oppression, to work in solidarity.

There is so much to disagree about, and it is important to disagree, but it is just as important to find agreement, to look for common ground. If we do not have agreement we often cannot move ahead together.

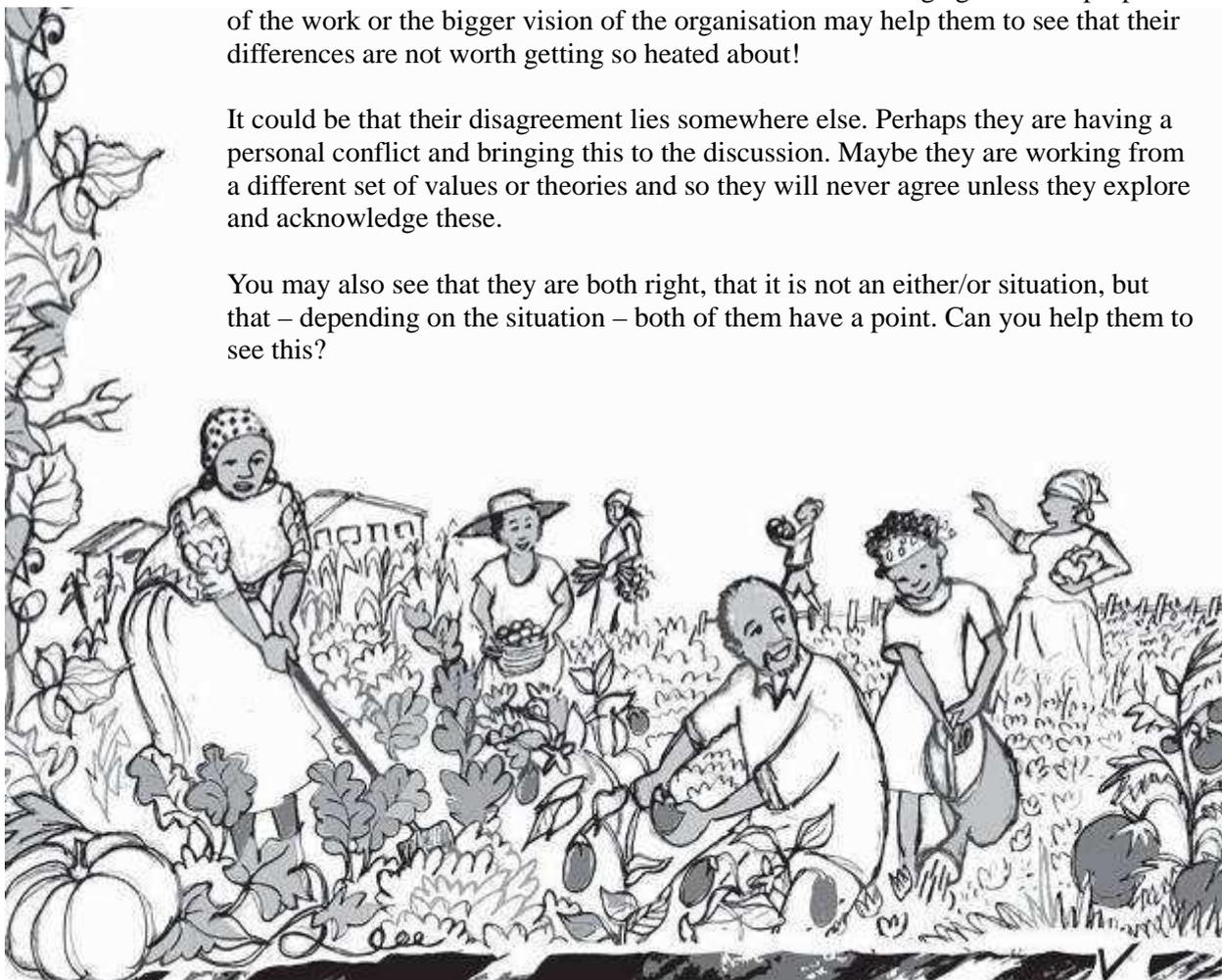
When we are facilitating a discussion it can easily become an argument. Our diversity becomes a source of conflict, which can be healthy, but it can also become stuck, with people trying to win the debate.

One way to open things up is to ask people to pause and ask themselves where they do agree, and to share this. They may not easily see it, so you may have to suggest where there is common ground.

Sometimes people love to disagree – they like the energy of arguing – but often their differences don't matter that much. Your task might be to bring them back to the purpose of the discussion, to ask them how important their disagreements are for the actual work that needs to be done. Sometimes looking again at the purpose of the work or the bigger vision of the organisation may help them to see that their differences are not worth getting so heated about!

It could be that their disagreement lies somewhere else. Perhaps they are having a personal conflict and bringing this to the discussion. Maybe they are working from a different set of values or theories and so they will never agree unless they explore and acknowledge these.

You may also see that they are both right, that it is not an either/or situation, but that – depending on the situation – both of them have a point. Can you help them to see this?



## A.6 Work with left and right brains

Our brains are divided into two halves or hemispheres. The left half deals mostly with logical thinking processes while the right half deals more with imaginative and emotional processes. Using both sides of the brain well enables us to think and act creatively.

<b>Left Brain Functions</b>	<b>Right Brain Functions</b>
uses logic	uses feeling
detail oriented	"big picture" oriented
facts rule	imagination rules
words and language	symbols and images
present and past	present and future
math and science	philosophy & religion
can comprehend	can "get it" (i.e. meaning)
knowing	believing
acknowledges	appreciates
order/pattern perception	spatial perception
knows object name	knows object function
reality based	vision or fantasy based
forms strategies	presents possibilities
practical	impetuous
safe	risk taking

Most organisations encourage their people to be left-brained, ignoring their right-brain capacities and thinking in their processes and activities. Many of their learning processes follow the same pattern.

*Think of a meeting or workshop you have recently been to in your organisation, and look at the table. What percentage of what you did is left brain and what percentage right brain-oriented?*

The way you organise your learning activities will influence how people address an issue or learn from their experiences. If the activities are too left- or too right-brained, important insights and learnings may be missed. You wouldn't use half your body to play football, although one leg may be stronger than the other. The two parts of the brain support each other and focusing exclusively on one is like playing football with one leg. (For more on this see 'The Master and his Emissary': a think piece on the *Barefoot Guide* website.)

If you include creative activities in your workshop or learning process this can bring new ideas and dimensions to the learning. For example, asking people to see a situation as a picture or metaphor can produce an 'Aha!' moment that enables people to move forward

from being stuck after hours of discussion.

We are often resistant to thinking in different ways and automatically think with our left brain. As facilitator we will need to nudge people out of their comfort zone by introducing unfamiliar activities. Don't be put off if everyone groans when you suggest something new. Once they are fully involved, they may find – to their surprise – that they are enjoying it and learning in new ways as well!



## A.7 Keep an eye on the “real work”

Sometimes as facilitators we can get so involved in the details of the activities that we forget about some of the deeper work that we are responsible for.

Consider these key roles:



### Inspiring people to learn

Are people inspired to be learning? Do they believe that it is

worth investing time and energy in this activity? Is it meaningful for them?

### Energising people to learn

It might be that people are inspired to learn but they don't have the will.

Perhaps the space is not safe. It might be that they are afraid to be honest. Or they feel stupid and don't want to expose themselves. They might be exhausted. What is de-energising them to fully and willingly participate in the learning activity?



### Focusing the learning on what matters

Are the learning questions clear? Are the activities

focusing on the things that matter to the people trying to learn?

### Grounding the learning in experience

Do the learning activities really draw on people's experience,

valuing and using it? Are “mistakes” seen as an opportunity to learn? Are people forgiven for these?



### Challenging learning

Is the activity challenging enough to help people to break

out of their comfort zones, to think out of the box? Are the difficult questions being asked or avoided? Are they being asked in a positive or a negative way?

### Supporting learning

Is there good human warmth?

Are people feeling supported enough that they are open to being challenged?



# B. Key elements of learning processes

## B.1 Beginning a process

### a) Warming up the room

Helping people to meet each other respectfully and warmly is the first thing to do. In the process they gain some trust in each other and some self-confidence which will better enable them to be themselves, to feel that they are being noticed, that their voice will be respected, that they have a role to play. A warm, friendly environment may take time at the beginning, but it may also save a lot of time later on, building a cooperative atmosphere where people make an effort to get along. If participants have never really met each other, then it is easier for them to ignore each other's feelings and this can lead to timewasting conflict later on.

As facilitators we must not forget to introduce ourselves, to let people really see us, to know how we are feeling (excited, anxious?). This helps to build trust between us and in the processes we are facilitating.

It is often a good idea, near the beginning of a process, to let each person say something, their names, how they are, where they come from etc.. This helps people to see each other but also enables them to test how their voices sound in the space. If very shy people don't say something early on in the process, something that helps other appreciate them and makes them feel good about themselves in front of others, then they can easily keep quiet for the whole day!

#### How about a quick "Party"?

How many of us start workshops or meetings by asking each person to say their name, how they feel, what they expect etc.? But this can get quite boring and take a long time. One good idea is to have a quick "Party". Ask everyone to stand up and to mingle around, like at a party, meeting as many people as they can, one-to-one, saying their names, how they feel, what they hope for, before moving on to meet the next person. It creates an energetic buzz, people get to try out their voices and soon become relaxed with each other. Why not serve something to drink as well?

### b) Establishing good and clear purpose – why are we really here?

Most people want to agree on and to be clear about the purpose of the process. This may be something you bring, but it also may be something that you can help participants to develop themselves to build ownership.



But there is a bigger job here, as a facilitator, which is to ensure not only that there is a clear purpose but that the purpose is a good one, meaningful and worthwhile. How are you going to do this? Sometimes you may simply ask “Are we sure this is what we want to get out of this? Is there anything else more important?” Give people time to think about it, possibly even chat to their neighbours to generate more thinking. This will save time later.

Later in the process you may want to look back on the purpose and see if it needs to be re-thought.

### c) Should the programme always be described at the beginning?

Some people want to hear all the details of what will happen, what will be the “outcomes” etc. This may be helpful for them but can take a long time. Other participants may become bored with all the details or wonder when things will actually start. Others don’t want to know, preferring to discover for themselves and to be surprised. Think about what is necessary for the situation and what suits most people there. Are there ways that you can cater for everyone’s needs?

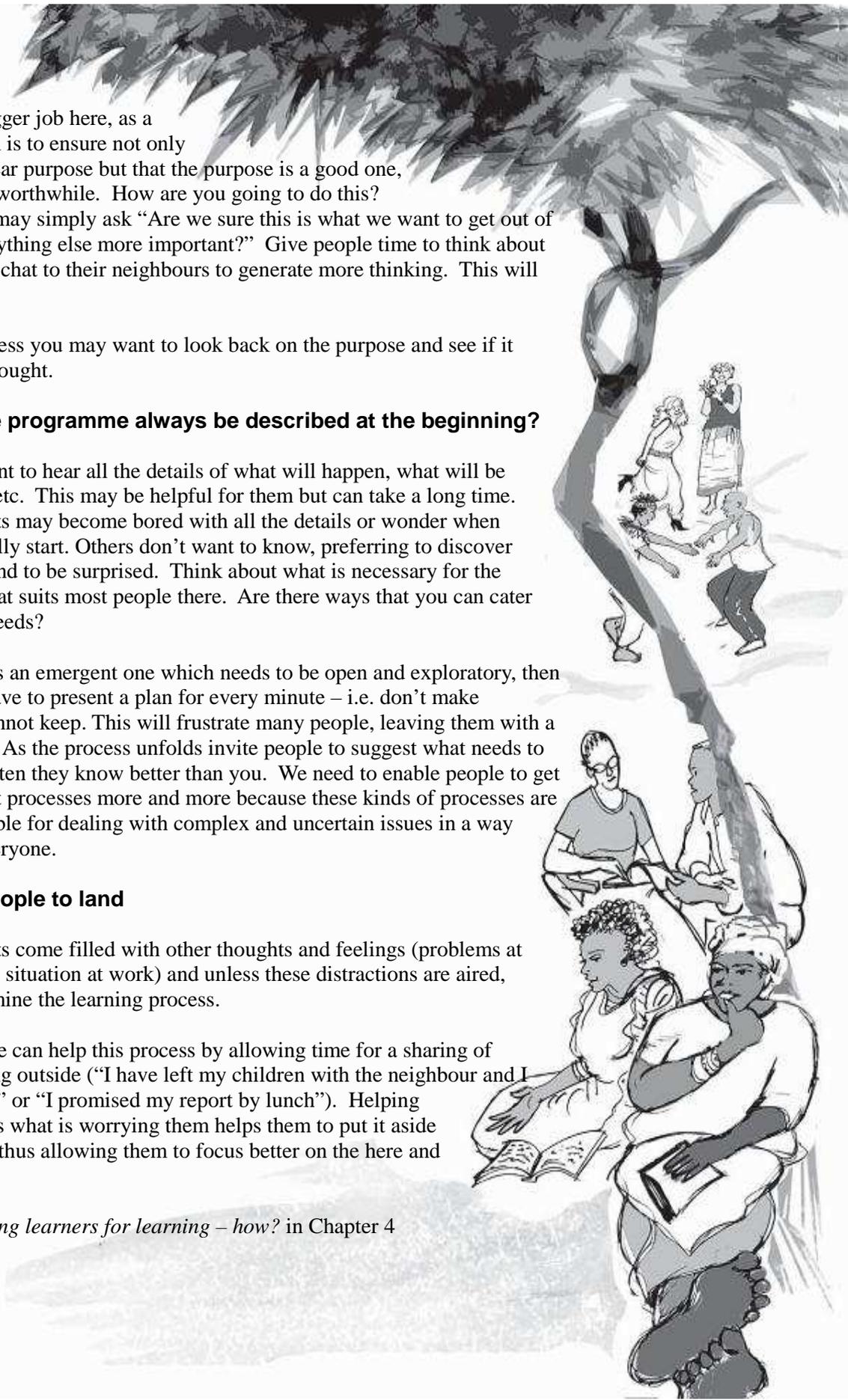
If your process is an emergent one which needs to be open and exploratory, then don’t feel you have to present a plan for every minute – i.e. don’t make promises you cannot keep. This will frustrate many people, leaving them with a feeling of chaos. As the process unfolds invite people to suggest what needs to happen next – often they know better than you. We need to enable people to get used to emergent processes more and more because these kinds of processes are often more suitable for dealing with complex and uncertain issues in a way that involves everyone.

### d) Helping people to land

Often participants come filled with other thoughts and feelings (problems at home, a stressful situation at work) and unless these distractions are aired, they may undermine the learning process.

As facilitators we can help this process by allowing time for a sharing of what is happening outside (“I have left my children with the neighbour and I am a bit worried” or “I promised my report by lunch”). Helping people to express what is worrying them helps them to put it aside for the moment, thus allowing them to focus better on the here and now.

See also *Preparing learners for learning – how?* in Chapter 4



## B.2 Future Springboard... how to end a process well

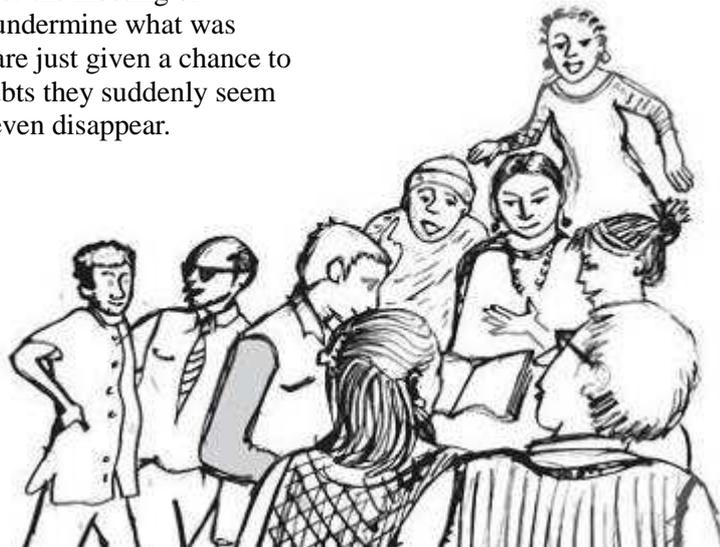
**A**s we end a workshop, meeting or strategy session it is time for us to review what we have finally learnt of value, what new ideas we have developed and what our next steps are into the future. If we do not leave enough time for this it may mean that the whole process was just about talking and no action. This common complaint undermines people's energy for taking learning seriously.

### **Allowing fears and doubts to be expressed**

Before we leave a process it is often vital to share *the doubts, fears, worries or reservations we still have*. We may have come up with good ideas, but if we do not voice any lingering fears or doubts then it is quite possible that we will not be fully committed or energised to act. Some leaders don't want to ask these questions, worried that it will give space for negative feelings to spoil what has been achieved. But the truth is that if these feelings are left unsaid then they do grow, after the meeting or workshop, and often undermine what was agreed. Often, if we are just given a chance to voice our fears or doubts they suddenly seem quite manageable or even disappear.

### **From individual to collective conclusions**

One secret to commitment is to build it out of individual reflection and preparation. Practically, in this context, it could mean giving a little time to individuals to sit and think for a few minutes about the questions below, before they turn to each other for discussion. This way each person can express their will and thus a more accurate picture of the collective commitment becomes clear.



### **Looking back... looking ahead**

This is a reflective and forward-looking time when both as individuals and as a group we can look back and see what we have finally learned, what ideas this has led to and what we are going to do.

#### **Some useful questions:**

- 1) What are the most important learnings, questions and ideas we have reached in this session?**
- 2) How are we feeling? What was helpful in this discussion, that enabled us to come to these learnings? What was not helpful?**  
This question will help you become more conscious of what works and enable you to improve your meetings in future.
- 3) What are we going to do next? Who? When?**

## B.3 What's the point of Powerpoint?

Powerpoint presentations have taken over. We are now treated to slides and slides of beautifully formatted text, with lovely bullets of all shapes and sizes, eye-catching backgrounds and even the occasional photograph and diagram. But how boring and oppressive Powerpoints can be, with page after bulleted page of more information than we can deal with, quickly losing our eye contact and relationship with the speaker. Frankly, I am starting to feel insulted by long Powerpoints and yearn for well prepared presentations that engage me as a human being.

My colleague, Sue, recently gave a Powerpoint presentation at a major conference. But while she was speaking she only had a photo of a lovely garden bench on the screen. Now and then she paused to show a few photos on Powerpoint related to her talk, giving the listeners some relief from words. When she was telling her stories or giving her analysis she was looking at the people and they were looking at her! Several people came to her afterwards to thank her for not subjecting them to the normal Powerpoint deluge of bulleted words!

Powerpoint has its uses particularly for representing images or dynamic diagrams. But a good story and a well-prepared and clear argument requires eye-to-eye connection between speaker and audience.

### World Cafe versus Powerpoint

*"I'm just not sure how valuable it is."*

*He wasn't the first person to give me lukewarm feedback on the regional forum. Its purpose was to provide an opportunity for people from different countries and organisations to learn from each other. Most people I asked were quite critical of the event.*

*Traditionally, the centrepiece of the forum was a Powerpoint update from each participant on the past year's activities. It doesn't sound so bad. And everybody is keen to give their own presentation and field questions. However, the truth is that it is exceptionally difficult to stay focused through 10 consecutive Powerpoint presentations. For many, the phrase "death by Powerpoint" elicits a wry smile. 90% of listeners move into a very passive listening (or snoozing) mode.*

*The rest of the meeting involved plenary discussions on a range of issues, normally being kicked off by another Powerpoint presentation. We agreed in this meeting that the following year we would hold an event focused around three 'working groups' dealing with issues deemed priorities by the participating organisations.*

*So the next year, we entered experimental mode and we reached agreement on what the three working group topics should be.*

*Meanwhile, I'd become aware of a range of methodologies for promoting group dialogue. We wanted to have an opportunity for everyone in the forum to connect with each other and share their news. So instead of Powerpoint updates, we decided to begin the forum with a 'World Cafe' activity asking participants to share their biggest work question. Running this activity involved taking people out of the formal meeting room and into another location decorated as a cafe with music, food and drinks.*

*It was a revelation. An intense hour and a half followed, full of noise, discussion and laughter. The quality of listening was in a different league to that I'd observed during the Powerpoint presentations.*

*Later, participants moved into their working groups where they stayed for the next three days. This required each person to play an active role in their group, and reveal the deeper issues within their work.*

*Occasionally, someone would come up to me and ask, "When can I give my Powerpoint presentation?" And I would politely explain that this year, the World Cafe activity had replaced the Powerpoint updates.*

*At the end of the forum, the most common piece of feedback was, "we want to bring this way of doing meetings back to our own organisation."*

*(See page 29 for a sketch of World Cafe)*

## B.4 Creating a learning space

If we want people to learn together well then the spaces we use should promote learning. Fresh air, natural light, a connection with nature and a warm atmosphere can make a big difference to how people relate to each other and how well they learn together.

### Diverse spaces

We are diverse beings, different from each other but also different in ourselves. If I sit in the same chair all day, or even the whole week, does this help me to open myself to different relationships and viewpoints? But if I am encouraged to move, to sometimes sit, sometimes stand or work outside, won't this help me to be more open and creative? We need outer variety to bring out our own inner variety.

How, as facilitators, can we offer variety, not only in our methods, but in the spaces into which we invite people to learn? How do we use the

room, the chairs, the tables, the walls and floors, the garden or courtyard? Think of the learning, meeting or workshop space as a play area which can take a different shape for every session, which can encourage different kinds of relationships and a variety of encounters appropriate to the varied aims of the process.

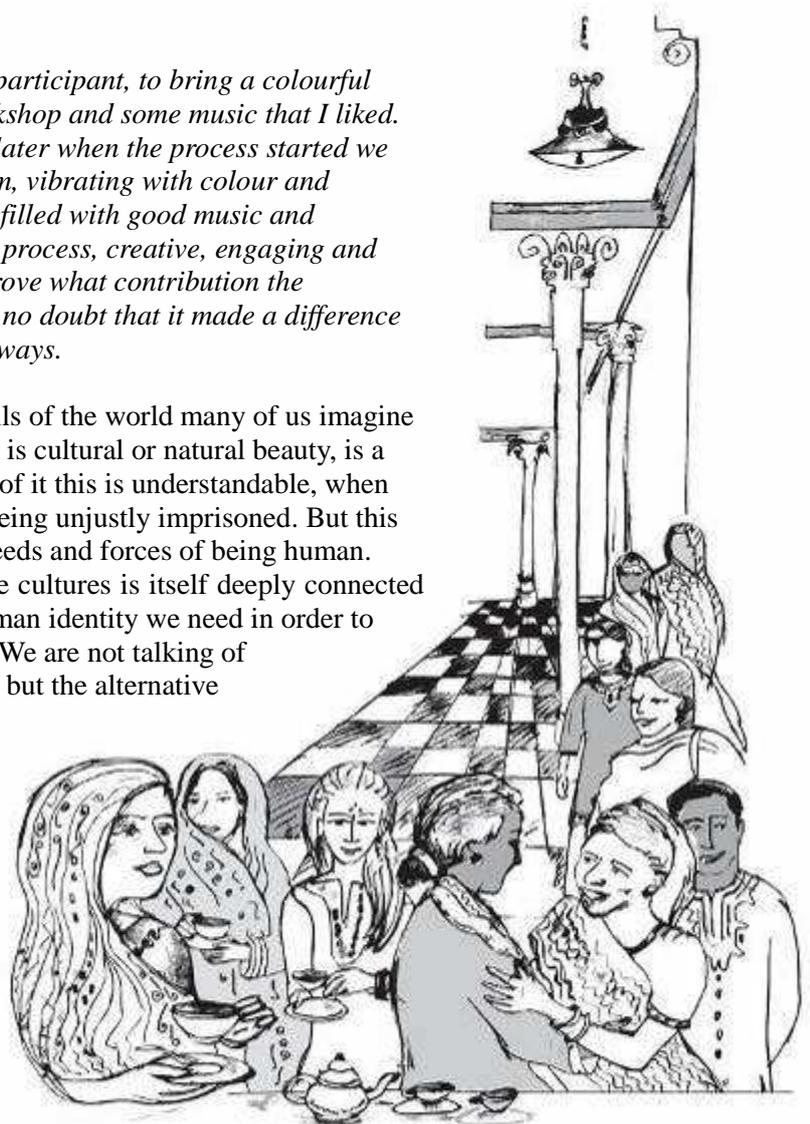
Why not ask the participants for their ideas about how they would like to use the space? You may be surprised at the ideas that spring forth and it will help them to feel more ownership of the process.

### Beautiful spaces

*Many years ago I was asked, as a participant, to bring a colourful print or picture to a weeklong workshop and some music that I liked. I gave these in at registration and later when the process started we walked into the most beautiful room, vibrating with colour and images, mostly African prints, and filled with good music and luscious pot-plants. It was a great process, creative, engaging and fruitful. Although it was hard to prove what contribution the beautiful atmosphere made, I have no doubt that it made a difference in many obvious and more unseen ways.*

In our urgent tasks of addressing the ills of the world many of us imagine that worrying about beauty, whether it is cultural or natural beauty, is a luxury we cannot afford. On the face of it this is understandable, when children are not eating or people are being unjustly imprisoned. But this is a misunderstanding of the deeper needs and forces of being human. Bringing the beauty out of our diverse cultures is itself deeply connected to unlocking the humanity and the human identity we need in order to fully deal with poverty and injustice. We are not talking of shallow, cosmetic, commercial beauty but the alternative to this. If we leave beauty to the market we are giving up on one of the essential elements of human culture that must flourish amongst empowered people who love and value each other.

In small and large ways, the striving for authentic beauty in our organisational processes, can add richness to our learning and to our relationships.



For example, is the room clean and inviting?  
Would a few plants make a difference to helping

people feel more human and cared for? Have  
you cleared the clutter of the last process?

### Power in spaces

Where do you as the facilitator sit or stand when working? If you always stand in front you may well be indicating where the power lies in the group – with you. Often I will change my seat and sit with the participants rather than separate from them. Or move to the side (“a guide on the side”), leaving the front open for different people to move into at different times. You can also encourage the sharing of responsibility through asking participants to facilitate certain processes.

The way you deal with your power, as a facilitator, often has an important impact on the way the group deals with its own power issues, both within the group and between the group and outside forces. For example, if you bring interesting questions and information, from the front, this may empower, if this is what the group needs, but it may disempower, reinforcing the belief that they need strong leaders to supply the questions and feed them information, thus undermining their own leadership potential.

A useful question to keep asking yourself as a facilitator is:

“Who is participating in whose process?”



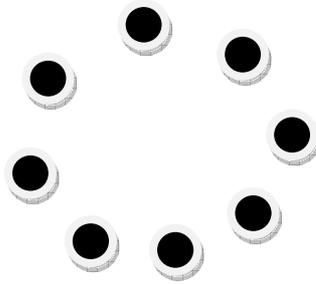
## B.5 Seating and tables

When laying out chairs and tables for learning processes, think about how you can help people to feel more human, more equal and also make it easier and more flexible for creative group processes. Shown here are some common layouts to consider.

### The simple circle of chairs

Where everyone is equal and can see each other eye-to-eye. This can be small or large. It is useful for:

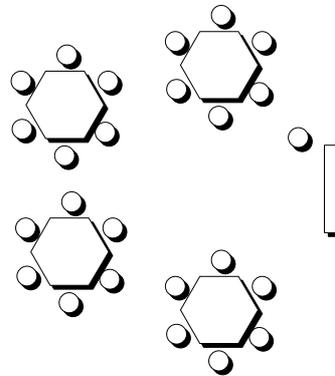
- More intimate processes where people need to look each other in the eye
- Where people need to share experiences, tell their stories



### Group tables

Tables and chairs set up like this are useful for:

- Processes where people have to write a lot
- Where there is a combination of presentations, working in pairs, groupwork and large group discussion. This arrangement saves time as people can simply turn in their seats for different arrangements
- World Café (see page 28)
- Processes where people do drawing, painting or sculpting

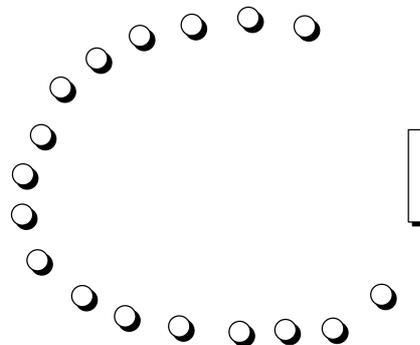


### A semi-circle

Like a story circle but allows for presentations as well. The larger open space in the middle also enables people to move around the room for ice-breakers, role plays.

There are no tables in the way which encourages more openness.

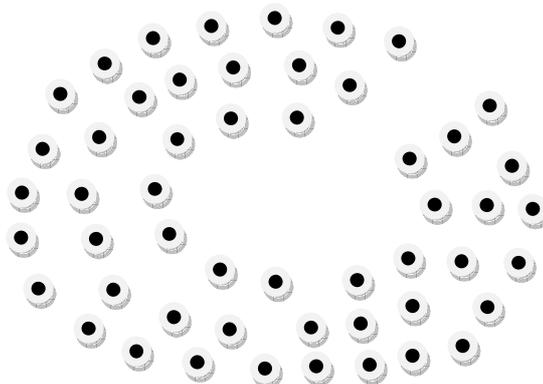
Some people like to sit on the floor if there are cushions. Good for larger group dialogue.



### Circles in circles

Often when we hire a hall for a big meeting we accept the rows and rows of chairs. But this reinforces power hierarchies and people cannot see each other.

Shown here is a layout of chairs that helps to break down barriers and encourage participation and a feeling of equality.



## B.6 Helping people tell their stories well

Everyone is interesting if you look hard enough and everyone has an important story to tell from which we can all learn. Telling good stories of our experiences provides the foundation for good reflection and learning. So, helping people to tell their stories well is a key challenge for learning facilitators. Some people are natural storytellers but others find it difficult to share what they have experienced and need help.

Many people think their experience is not interesting to others or worth sharing. Your curiosity as a facilitator can make a big difference.

If someone tells us a good story of an experience they have had then, as the listeners, we are drawn into the story, becoming part of it, as if the story is ours, our own experience. This makes learning easier, because we learn better from our own experience. This is why all ancient cultures use stories to teach and learn from.

Good questions help to guide people in telling their stories – what happened first? What happened next? What did you do then? How did he react? How did you feel?

Sometimes the best way to get people to tell a deeper story is simply to ask “Can you tell us more about...” or “How did you feel about that?”

Listening actively is also important. Can you give your whole attention to listening and encourage other participants to do so as well. After the story, ask people to reflect back on what they heard, “What struck you? What were the important messages you heard here? What pictures or metaphors come to mind?”

Where the situation you are working in still has a strong oral culture, then you can draw on the traditions of this to encourage people to tell their story. Ask them how they like to tell stories, and where it would be most enjoyable or conducive.

Drama can also be very effective. If someone has a story, they can tell it to a group of people who then act it out with the person.

I watched a group of deaf teenagers do this to great effect. They portrayed the childhood experiences of one boy. They all became emotionally involved in the story. Afterwards, one of them interviewed the boy: ‘Was the teacher in the play like your teacher in real life?’ ‘No, he hit me harder than that. He thought I was stupid.’ The audience asked questions, helping him understand how his experiences had affected him and how he could help others cope with similar situations.



## B.7 Collecting better information from a story

One of the reasons we find it difficult to reflect more deeply is that we struggle to collect good enough information to reflect on. Often the missing information we need is hard to collect because it is not very visible – like the feelings, unspoken thoughts, assumptions, relationships and motivations of different people. But if we do not access and understand these things then we are just skating over the surface.

Relating experiences or telling stories is the key approach to action learning. Here is a simple technique to help us to get a better quality of information or data from our stories:



### Getting Out the Inside Story

- A. Tell or write down the story. If you are telling it you could ask someone to write down what you say **on the left-hand side** of a flipchart. If you are writing down the story yourself then do the same on a page. This is **the Outer Story** (see below).
- B. After this has been done go back and, **on the right-hand side** or column, tell or write down some of the feelings, unspoken thoughts, assumptions, relationships and motivations of different people that you remember. Do this for each part of the story that you wrote in the first column. What were the less visible things happening – this is the **Inside Story**.
- C. Now, in the right-hand column you have better, deeper information to use in your reflection and learning process.

A simple example:

#### The Outer Story

Do this first (look)

*(the events as they unfolded, the more visible things that happened)*

We were invited to a meeting with the women's group. They welcomed us warmly.

We brought some agenda items, questions and a typical MOU and asked for their ideas. We had some interesting discussion and talked about some possibilities. They looked at each other but not at us. They seemed shy.

The women were polite and did not say much. They said they were glad we had come and would contact us. The meeting was not long.

We have not heard from them, which has puzzled us. We are wondering if we should visit them again.

#### The Inside Story

Do this second (look again)

*(the feelings, unspoken thoughts, assumptions, energy, relationships, metaphors)*

We were so excited – I think the women were also excited.

They seemed surprised when we brought our agenda, questions and MOU (we assumed they needed them). I felt a bit uneasy. Maybe they were disappointed. Looking back, I think we brought too much.

They were still being polite but they were not so warm. I imagine now that they saw us like the other NGOs whose projects they had joined.

I think we are more interested in this than them. I feel like a shopkeeper with no customers.

*Can you see that the Inner Story helps you to get behind the scenes to where the real action was?*

## B.8 Tips on asking good questions

Good questions are the keys to unlocking good learnings. Our ability to ask our own good questions in an area that interests us can produce high levels of thinking and engagement. Simply put, good questions are more likely to lead to good answers. Badly formulated questions are more likely to mislead our thinking and discussions.

The power of *Action Learning* lies in our ability to ask effective questions about our experience, questions that help us to reflect well, out of which we can draw useful learnings and insights.

### A few kinds of questions to think about...

We need to choose questions that suit the purpose of our inquiry:

**Closed questions** are useful when you want specific information that is already known to the person being questioned. A closed question is seeking either a Yes or No answer or more details, e.g. “Are you married? How many children do you have?”

**Open questions** do not invite a specific known answer – rather they open up new information, thinking and discussion, encouraging others to engage. e.g. “Can you say more about what happened? How do you cope with the stress? How do you feel about his criticism?”

**Closed then open questions** also work well together. Here you might be asking for more information or opening up the discussion, e.g.



*...I would like to beg you dear Sir, as well as I can, to have patience with everything unresolved in your heart and to try to love the questions themselves as if they were locked rooms or books written in a very foreign language. Don't search for the answers, which could not be given to you now, because you would not be able to live them. And the point is to live everything. Live the questions now. Perhaps then, someday far in the future, you will gradually, without even noticing it, live your way into the answer.*

“Are you employed?” (closed question) “What do you like about your work? What frustrates you?” (follow-up open question).

**What, when, where, who, why, how questions** help us to analyse and understand what has occurred or the reasons for it, e.g. “When did that occur? Why was it helpful?”

BUT, be careful of using the question “Why?” inappropriately – e.g. “Why do you think you are struggling to make ends meet?” or “Why is there conflict?” People often feel interrogated and judged by this kind of question.

**Questions often have underlying assumptions** For example, “Why were you so irritated?” assumes you were so irritated. If these assumptions are not shared by the recipients they will either not be understood properly or even be found offensive.

So the way we ask a question can make a difference to the responses we will get and therefore careful construction of questions is needed by questioners, whether they are facilitators or participants.

**Questions that don't have quick answers** The big questions we ask (e.g. “What is social change and development? What do I really want in life?”), do not have ready answers. We have to hold these questions over time, revisiting them and deepening our thinking around them. Consider this quote:

Rainer Maria Rilke, 1903  
in *Letters to a Young Poet*

## B.9 Better reflections, deeper learnings and more effective action

After we have an experience we often ask ourselves “What did we learn?” But this may not produce useful learnings. Why? Because for deeper learnings we first need to pause awhile to reflect on the experience, stepping back to really think about what happened and why. This way when we ask “What did we learn?” we will have several insights to draw from.

### Steps to deeper learnings

#### 1. Action

The first step is to recall or remember what actually happened in as much detail as possible. Avoid analysing and drawing learnings this stage.

You can do this **individually** or **collectively**. If you do it collectively, then try reach some agreement on what happened. If you cannot agree then it shows how different people can experience the same event very differently. This difference may be worth reflecting on and reveal some interesting learnings.

What were you thinking and feeling? What were others thinking and feeling? What did

people want at the time, what was motivating them? See page 19 above for a good method for this



#### 2. Reflection

Once you have recalled what has happened then you can start to reflect, to think about why things happened in the way that they did.

Helpful questions to ask are:

“What helped and what hindered?” and

“What assumptions did we make? Were they valid?”

This often reveals key insights and learnings – e.g. “We assumed that everyone supported the chairperson but discovered that he was not trusted by the old people. This may explain their objections to the proposal.

“What really struck us?”

“Do we know of any other experiences or thinking that might help us look at this experience differently?”

Think about any similar experiences you have had. These may reveal some interesting patterns of behaviour – e.g. we realised that on both occasions the women fell silent when the men started arguing amongst themselves.



### 3. Learning

With some good reflections in your back pocket, you are now in a better position to begin to discuss **what you learned from the event**.

Looking at your reflections think about different learnings you can draw out. *These could be insights that you could apply to other situations.*

For example, from the one example above (of the men arguing) you may learn that when some people (often men) become argumentative and conflictual, that this can marginalise, alienate and silence other people (often women).

#### Questions to guide learning:

- *What would we have done differently?*
- *What was confirmed?*
- *What new questions have emerged?*
- *What other theories help us to deepen these learnings?*
- *What do you learn from this about the future actions or behaviours?*

You can start **making connections** between what you are discovering and your own current knowledge, skills and understandings. What theories, ideas, concepts and insights gained from your knowledge or past education have you applied or could you have applied in the situation? How helpful are these ideas? How could you use them to better effect or how could you modify them to make them more useful?



How does what you have learned from this event **relate to other events** in your life? What themes and similarities do you notice? What differences and contrasts can you see and how do these similarities and differences affect your view of your own development? Has your insight been deepened? Has your perspective been broadened? What have you appreciated about your own actions and behaviour and their impact? What have you learned from other people's actions and behaviour?

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### 4. Planning

You **look at the consequences** to applying these learnings. What will happen when you apply this learning?

You **identify any blocks** that may occur to stop you applying the learning. This is also where you may surface what you need to unlearn.

Then you **clarify your first steps** in applying the new learning. What will you do next? You are addressing the 'now what'.



Finally, you work out **how to really integrate** this new learning into your life through ongoing application.

## B.10 Guiding questions for the Action Learning Cycle

### **ACTION**

What significant things happened?  
Describe the events. Who was involved,  
what did they do? What picture emerges?  
How did people feel? What did they  
want?

### **PLANNING**

So what does this mean for  
practice? What do we want?  
What do we want to do, to  
happen? How? What are we  
going to do differently?  
What do we have to let go  
of or stop doing? How will  
we not repeat the same  
mistake? What steps will  
we use to build these new  
insights into our practice?



### **REFLECTION**

Why did it happen, what  
caused it? What helped,  
what hindered? What did  
we expect? What  
assumptions did we make?  
Were they valid? What  
really struck us? Do we  
know of any other  
experiences or thinking  
that might help us look at  
this experience  
differently?

### **LEARNING**

What would we have done differently?  
What did we learn, what new insights?  
What was confirmed? What new  
questions have emerged? What other  
theories help us to deepen these  
learnings?

## B.11 How to use creative and artistic activities in learning processes

“I can’t draw!” “Don’t ask me to sing, are you mad?” “I will embarrass myself if I dance!” Hands up if you are one of the many people who might say this if asked to do something artistic or creative! Many of us learnt at an early age that it was only worth doing these things if you were 'good' at them. We are afraid people will criticise us or laugh at us. If we are forced to sing or draw or dance or act then many of us freeze up.

We all have creativity inside us and anyone can encourage and grow that creativity in themselves and enjoy it – we all have an inner need to express ourselves creatively. Since change is a creative process it is important that we develop our creative capacities, or risk becoming technicians trying to engineer rather than cultivate development. Importantly, art and creativity enable deeper insights and learning. (See page 9 above for more about this.)

*In Senegal there is a troupe of local artists (singers, dancers, storytellers, painters) who work with groups in villages to bring out their hidden creativity. While they are doing this they ask people, “What kind of future do you want? How can you create it?” In the process they surface enormous, energy, ideas and initiatives.*

If you introduce creative or artistic activities you may encounter resistance from some. Don’t let this put you off. Here are some guidelines:

- **Insist that people try.** Be firm about using drawing, games, clay etc. – once learning comes they change their mind.
- **Invite a local artist regularly** to give an art class to the organisation or community group. Ask people to explore links between the creative experience they have and development or learning.
- **Don’t try too many** different kinds of art forms or media at once – let people get used to one first. Different people take to different art forms so aim for variety in the longer term.
- **Change the venue** – have a meeting while walking through a forest, sit on the lawn.
- **Question the Powerpoint presentation!** - challenge people to present their ideas in different ways.
- **Introduce and encourage metaphors,** or word pictures – ask 'if this problem were an animal what would it be?' and similar questions. You'll be surprised at the innovative solutions people then come up with.



*What could this metaphor be saying?*

### Different art forms and some of their benefits

**Singing** – to build community, to help people find their voice, to express their emotion.

**Clay sculpting** – to get grounded, to get in touch with their will and to move to action.

**Painting in colour** – for healing and helping people to deal with trauma, developing inspiring pictures of the future. Colour conversations can help build relationships.

**Drawing** – to surface hidden issues and questions.

**Movement and dance** – to build cooperation and to reveal and build the will to act and move

**Drama** – helps people to explore and reveal issues in surprising ways, to more easily speak the truth from behind masks or roles.

**Metaphors or word pictures** – to describe difficult or hidden things that cannot be easily described in normal language.

## B.12 How to work with resistance and “difficult” people

Some facilitators really struggle to deal with “difficult” people in learning activities. Others are able to contain them. And a few are able to turn the negative energy they bring into something positive, even transformative, for the whole group. Let’s explore this a little...

There are different kinds of “difficult” people:

**Some people talk too much, demanding airtime and attention.** This can spoil a whole activity. Be firm that everyone must get a chance, and say that it is important that more voices are heard. Encourage quiet ones to speak. If the person becomes impossible it is sometimes worthwhile to call a quick break and speak to the person privately: “I notice you are contributing a lot. How can we get others to speak up?”

**Some “difficult” people bring up hidden issues that others are unable to voice.** These issues are not always easy to see and the “difficult” person may describe them in a way that annoys others. But it is often better that they come out than lie hidden. Ask the person to describe their feelings and specific experiences that created the issue. Encourage people to say if there is anything true in what is being said. See if any other people feel the same way. Often there is much to learn from these difficult people and the situation they create.

**Some people always criticise and ask difficult questions.** It’s just who they are. The problem is that they often do so in a negative way that irritates or angers others. The first



thing is for you to appreciate people like this, to realise that they can help a group to break out of its comfort zone or stuckness. But then how can you help them to do this more positively, in a way that is easier for people to hear? Can you speak to them in private, challenging them to bring their criticism more positively?

**Some people have personal problems which lead to negative behaviour.** The challenge is help them to put these aside, often through a personal chat in a tea break, even offering some personal support. Some people really don’t want to be there and behave in difficult ways. Unless they have to participate, it might be worth helping them to leave until they are in a better state of mind.

### How to deal with people who talk too much?

- First of all you should realise that it is your job to ensure that no-one dominates. Decide that you are going to face this challenge.
- If some people are dominating the discussion ask that people raise a hand before they speak. Then if someone who has not spoken raises their hand say, “We have not heard from Maya” and ask her to speak.
- You can say “Let’s hear from those who have not spoken.” And then ask someone, “Would you like to say something?” Do it gently.
- Don’t be afraid to put up your hand (a “Stop” gesture”) to stop someone talking if they are going on too long - ask them to please complete the point to give others a turn. Point out to them that if they say too much at once then people are likely to stop listening or only remember their last point.

## B.13 Interpersonal conflict – some basics tips

Conflict is a complex and surprising beast, difficult to deal with but often pregnant with opportunities for learning and transformation. We are taught that conflict is bad and to be avoided. But some conflict is unavoidable and, if faced well, can lead to good change.

Conflict often comes out of differences or diversity. Building a culture of inclusion and appreciation for difference is one way to avoid or lessen conflict.



### The real work of dealing with conflict is building empathy

Conflict is almost always a difficult emotional experience for those involved. Surfacing, sharing and working with emotions is key. Building **empathy** for each other is usually the most important work, **helping each other not only see each other's point of view but really see how the other is feeling.** If I tell you how I am feeling because of what happened, this can build empathy in you for me and help you to take responsibility for your role. And vice-versa.

### A basic approach

When trying to resolve conflict, it often helps to have a mediator, who is trusted by both parties, to hold a safe space, to keep the atmosphere respectful. This can be a formal session or it can be done informally, depending on how serious the situation is.

The mediator's work is to help the differing people to:

- a) **Describe their experiences**, encouraging them *to be specific* about what they experienced that led to the conflict. If he says "She undermined me!" then ask "What did she actually say?" to get a more specific answer like "She said people had complained to her about me." Don't allow vague statements.
- b) **Say how they feel.** "I felt embarrassed in front of others when she said that."
- c) **Say what they want.** "Next time, I would like it if she speaks to me in private first".
- d) **Reflect and learn.** After each has revealed this they can be encouraged to respond to each other. Ask them if they can understand how the other acted in that way. Ask them if they could have responded differently and what they might do next time. What have they learnt about themselves?



Sometimes the causes of conflict are in the past and cannot be resolved, only forgiven. However, forgiveness is more likely and sincere if people can see that something valuable has been learnt.

# C. Tips for different learning processes

## C.1 Action Learning Sets

An Action Learning Set (ALS) is a small group of practitioners that meets regularly to help each other solve problems, deal with issues, start new initiatives etc. They are based on the Action Learning Cycle. (see Page 21)

They are similar to Reflect Circles, described in Chapter 7 of the BFG2.

Being a member of an ALS must be voluntary – don't force anyone to join! Hold the ALS meetings regularly, maybe once a month.

For each ALS session set aside 3 chunks of time:

- a) 15 to 20 minutes to discuss how you wish to run the session, how it could be improved from the time before.
- b) 1 hour for each member (e.g. if there are 4 members you need 4 hours). In each hour a different person is the focus of attention – they get to present their issues or problem, get feedback and ideas for the way forward. Choose someone different to facilitate for each person's hour. You should use the Action Learning Cycle as a guide. (See Page 23)
- c) 20 minutes at the end to review major learnings and actions to be taken and to evaluate the session and make suggestions for improving it next time.



## C.2 Study circles

In my organisation we occasionally choose an important book or article to collectively study. This serves many useful purposes and does not take up much time. Yet it has played a valuable role in helping practitioners to develop stronger conceptual skills and for gaining a better understanding of our real work. It also helps us to cultivate deeper conversations and language between us.

There are different ways to schedule these, whether weekly, 2-weekly or monthly. We put aside 2 hours every month. A chapter of the book we are studying (or it could be an article) is distributed 2 weeks before which we all read, before we gather to discuss it

### Some tips for a successful Study Circle

**Think carefully what you want to study and how.** You could all bring some examples of books or readings to share, discuss and then agree which to start with. Choose one person to take responsibility for managing the whole process, ensuring people have the reading material on time and convening the circle at the agreed time and venue.

**Don't give people too much to read** – the idea is to study in depth.

**While you read, highlight what strikes you.** Participants are asked to highlight anything that really strikes them in the text as they read and to think about how it relates to their work.

**Ask one person each time to lead the discussion.** They may be expected to read the text more closely than the others and to bring stimulating and challenging insights and questions. We have found it useful to go through the reading page by page, not reading it (because everyone has already read it), but giving each person a chance to stop us to share what they found interesting on that page, sparking a conversation.

**Think about how to use the learnings.** Time should be left to discuss what was learnt of particular value and how that could be applied to work.



## C.3 World Café

Are you tired of old ways of doing group work and presentations, where a topic is presented, people go into groups, discuss and then report back to the whole group? This can be fine sometimes but it can also get a bit boring. There are alternatives. For example the World Café is a great participative and energetic way of getting everyone to participate in a different kind of group exercise:

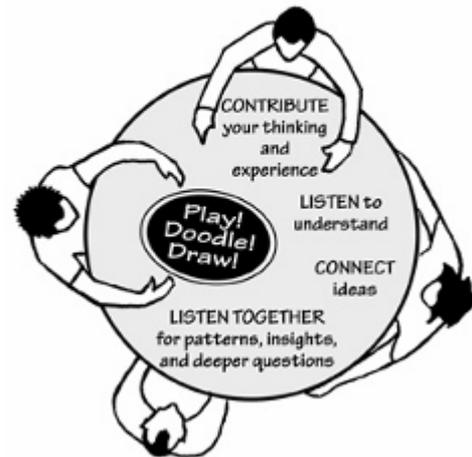
In the World Café people begin in different groups, each group sitting around a table on which there is big flipchart paper (a kind of paper tablecloth). They discuss the topic, writing down their responses, thoughts, doodles etc. onto the “tablecloth”. After 20 minutes or so the facilitator rings a bell or sings a song and all but one person from each table gets up and goes to another table. Usually they spread out to different tables to encourage cross-fertilisation.

The ones who stay behind are the **table hosts** – they stay there for all the sessions, welcoming people from each table and showing them what the previous group discussed and encouraging them to bring and write down their ideas on the topic of that table. After another 20 minutes or so the signal is given again and everyone (except the hosts) move to another table for another round. Usually 3 or 4 rounds are enough. At the end the hosts can be asked to summarise the discussions they have gathered on their tablecloths. The whole process can take between 1 and 2 hours.

If you have several short presentations for a group you can also use World Café as an alternative, with the presenters being the hosts, giving their presentations several times to the

### CAFÉ ETIQUETTE

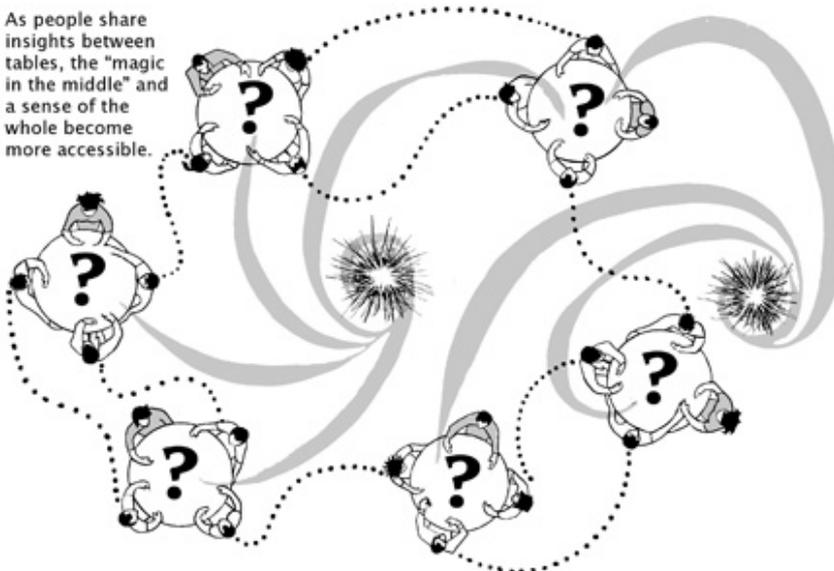
FOCUS  
on what matters!



small groups who visit their table every 20 minutes and giving space for their feedback and ideas. It can be a lot more interesting and participative than one presentation after another.

We have also used World Café to write “books” or field guides (like this Barefoot Guide), where each table is used to host a chapter which gets developed over several sessions and also connected and cross-fertilised in the process. Through this process everyone gets to brainstorm their ideas into each chapter which can be written up afterwards.

As people share insights between tables, the “magic in the middle” and a sense of the whole become more accessible.



For more information see:  
[www.theworldcafe.com](http://www.theworldcafe.com) “  
Pictures reprinted by  
permission from The World  
Café Community  
Foundation”

## C.4 Team building

**T**eam building is about helping people to get to know each other better, as people, to build empathy, caring, team spirit and trust, so that you can work better as a team. This may seem obvious but competitive forces inside organisations are often stronger and more destructive than we realise, separating us from each other and dividing our efforts, weakening what we can do together.

So what is the most effective way to build a team? Well, the good news is that any good organisational activity that involves a team, if successful, will help to build that team. We don't always have to have separate team building activities, although these can be helpful. If an organisational process has a human touch which helps people to enjoy each other's company while they are meeting or working together, then this will build team spirit and relationships. In our experience, a creative, exciting and productive strategic planning process is often the most effective team building experience..

Sometimes there is a need for a separate team building activity, specifically designed to help people work together better as a team. There are hundreds of ways to do this, from very simple to very involved ways. It may be enough to have lunch together regularly. It could be a good idea to share with each other your life stories. You could play a challenging game together where the way to "win" is to cooperate more closely (competitive games can undermine teamwork).

You could sing or drum together. You could simply ask people what they would like to do to get to know each other better.

### **But be careful...**

"Team building" is the most misused idea in organisations. If people are not getting along, if there is conflict or lack of communication the solution may not be a separate team building activity. It might be that the conflict is a result of many things, like different ideas of what the organisation should be doing, its purpose. Some people might be feeling discriminated against and resentful. A jolly team building process may only hide these deeper problems

Team building usually helps a reasonably healthy team get even healthier. But if a team (or organisation) is not in a good place, even in a hot or cold crisis, then team building may just be a plaster which covers the problem but does not solve it. Worse still, it may make people cynical, feeling that they are being patronised and not taken seriously.



## C.5 Learning from Case Studies

Working with a case study to draw learnings for future action is an Action Learning process. See Chapter 12 which deals with Action Learning and will help you design your own process

Why case studies? Case studies are an in-depth opportunity for a team of people to take a real situation, reflect on it, draw substantial learnings and apply these learnings to future situations. Case studies can “live” where the person brings a story or challenge they are facing and needs help from the team to decide what to do next. Or they case story may be in the past and the emphasis is on drawing more general learnings for all.

On the BFG websites there is also some good advice for setting up and running case studies. Here are some essential tips:

**Make it safe.** It is important that the person bringing the case study is not attacked by others for being honest about a “mistake” they may have made. Allowing people to criticize each other is fatal to good learning and will lead to people being unwilling to honestly share their case stories in future. Indeed people should be praised for honest sharing.

**Make it lively.** Ensure that the story is well prepared and excludes unimportant information. Try to use visual aids. Try to tell the story as a real-life drama not as a boring report. Why is this? Because a when people listen to a well-told story they can imagine that they were there and so it almost becomes a part of their own experience – and people learn best from their own experience!

**Look for the Inside Story.** Try to make sure that the “Inside Story” is told. See “Collecting Data from a Story” above on page 19. Otherwise the analysis of the story may be superficial and the learnings obvious and disappointing.



**Give time for individuals to collect their thoughts.** Sometimes it helps to have someone writing the main points of the story onto a flipchart as it is being told, into left and right hand columns. If most of the story goes into the left hand column, encourage the teller to give more “inside story” right hand column information, both during and after the story-telling.

**Kick out the story-teller.** When the team is analysing the story it is usually a good idea for the story-teller not to be there as this can stop people from making critical and unconsidered observations. The story-teller may get defensive and want to give more and more information.

**Reflection is the key to depth.** Make sure that you don’t rush into drawing learnings or developing recommendations. If you do, these will probably be superficial and misguided. Spend good time reflecting, trying to understand what was really happening.

When the analysis and drawing of learnings is complete you may then invite the story-teller back and discuss the way forward.

## C.6 Supervision, Mentoring and Coaching

Many healthy organisations use different combinations of personal supervision, coaching and mentoring to support individual staff members. In some organisations these are formalised, in others very informal and sporadic. Is your organisation using these vital sources of support and productivity in the most fruitful way? Making them more formal and regular may really help to improve both individual and organisational performance.

### Supervision

Individual staff members usually need a personal supervisor who enables each of them to be clear about their role and expected achievements and gives them regular feedback and emotional support. Without feedback, people often become insecure or resentful, which will affect their productivity.

Out of individual supervision sessions, supervisors can provide important feedback to the organisation, alerting it to issues, problems or possibilities that the individual may not easily share in meetings. Confidentiality can still be respected. Supervisors can also help staff members to better learn about and understand organisational culture, policy and practice.

### Mentoring

Good mentors are useful to help staff members who are taking on difficult new responsibilities. A mentor need not have organisational authority over the individual. Some organisations engage seasoned, retired practitioners to provide wise guidance and counsel to new staff members. The mentor helps the staff member to understand the practice as it has developed over the years, to show them the ropes, to share experience and wisdom, a bit like a master/apprentice relationship. A good mentor can inspire, support, help develop a depth of practice and cultivate in staff members a higher expectation of the quality



of practice required. A mentor can also provide good reading materials and a support for a study programme.

Civil society organisations, with their youthful and activist cultures, have lost sight of this age-old approach to learning, or do so in very loose, ad hoc ways.

Personal supervision can continue, parallel to this, to provide regular task clarity and support. The staff member may also need to go on training courses to develop certain capacities, but they should also be helped to apply their new learnings and skills in the work context, by the supervisor and/or mentor.

Staff members need to be appreciated and rewarded for being open about their struggles, as these become the key fuel for learning and improving their practice. If lots of pressure is put on them to produce results they may become anxious and insecure and start to cover up what is not going well, even to exaggerate their achievements, especially as they are eager to

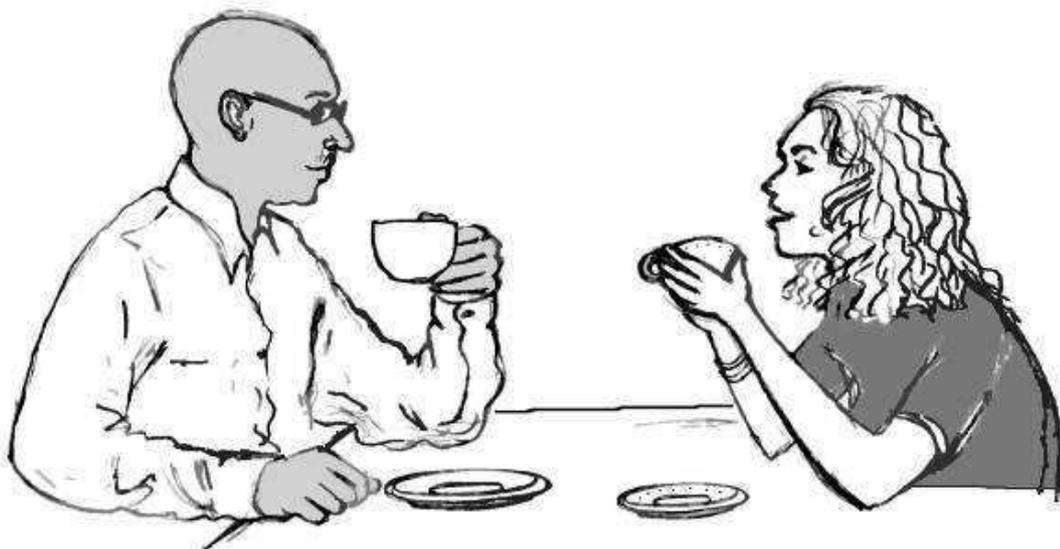
please – a very dangerous development that will undermine the whole practice.

## Coaching

As the staff member gains more experience they will need help to learn more systematically from this experience. This is where a coach becomes more useful. Different from a mentor, a coach helps people to learn more from their own experience rather than from the mentor's past experience. Most useful here is the action learning cycle as a core process, enabling them to work more consciously, responsibly and independently. The personal supervisor can play this role or another person can be contracted to do so.

As time progresses people need to be given more responsibility and authority over their own work but will still need emotional support from supervisor and coach.

Eventually as they become more empowered they will start to appreciate space, with more delegation and less frequent supervision, requiring less one-way support and direction from the organisation. If they have had good experience with supervisors, mentors and coaches they are likely to become useful in these roles for other, newer, staff members.



## C.7 Skills development

**W**hen new people are employed or move into new roles attention needs to be paid to their skills. Enormous investments are made in skills, for good reason, but unfortunately these are not always made wisely. Consider these points and tips:

**First be clear about role and purpose of the job.** Before sending people on a skills development process make quite sure that the purpose and role of that person is clear to them and that they are sufficiently motivated, that they see what is expected of them. If not, it is quite possible they will learn or pay attention to the wrong things.

**See if confidence is what is really needed.** Find out what the person is already capable of doing. They may tell you they don't have the skills but it is possible they know a lot but don't have the confidence to use their knowledge. In which case, they may only need some supportive coaching to encourage them to do the new work.

**Be careful about importing conflicting approaches.** If you are sending someone on a course, no matter how good, are they going to come back with ideas and approaches that are very different to those of their colleagues? This may be healthy, injecting new ideas into the organisation, but if not managed carefully it may lead to division and conflict. It may be wise to send the whole team or bring the course in-house.

**Is there more space to fly with new wings?** A newly empowered staff member returning from a course may become unhappy if they find that they cannot apply their new skills in the organisation because "the way we do things around here" is too strong. There is a good chance they will fly to an organisation that does give them space!

**Ensure that the new skills are immediately applied and practised.** New skills will quickly be lost if they are not immediately applied.

**There are many ways to acquire skills – use them.** Quite often a combination of approaches is what is required to help someone grow capabilities for a new job. For example, a person could spend a day or two with someone in another organisation who has experience in that field, followed by a short course and backed up with study materials and coaching. Civil society organisations tend to have two approaches: find out for yourself, on-the-job; or a short course. This may be cheaper in the short-term but the truth is that many organisations continue to amateurishly underperform as a result. Wisely investing in people is cheaper in the long-run, and gets the job done!



## C.8 Strategic thinking, strategic conversations

*“Without leaps of imagination, or dreaming, we lose the excitement of possibilities. Dreaming, after all, is a form of planning.”*

Gloria Steinem

*”Big thinking precedes great achievement.”*

Wilferd Peterson

**S**trategic thinking and strategic planning processes provide wonderful opportunity to renew life and meaning in an organisation. These kind of processes are part of the larger Action Learning cycles of organisations where, after reflections and evaluations, we take what we have learnt (and unlearned) from experience, ask the big why and where questions and then turn the answers into new cycles and initiatives of work.

When we strategise we stand back and look at the whole. We try to think big, sometimes with a confidence that we may not yet have, in reality. But that’s OK.

### Tips to enhancing your strategic processes

#### Strategic planning – an event or a continuous process?

Most civil society organisations do their strategic thinking every few years, in line with donor cycles. But is this OK? The context and circumstances of social change are so volatile nowadays that one of the reasons we see so many organisations struggling to survive is that they are simply not keeping up with the times. There is a strong case to be made for continuous strategic conversations, putting aside regular time, every month or two, to review progress and rethink strategy and approach.

**Involve more people, somehow.** Unless we think and act more in collaboration, we will become irrelevant. Individual action will not address complex challenges. Experience suggests that if we get together with stakeholders and potential collaborators and share our experiences and learn from each other, then we prepare the soil in which we can plant the seeds of collaboration.

#### Be creative by doing creative activities.

Future thinking is, by definition, creative thinking. We cannot logically plan our future visions and strategies. Future planning requires acts of imagination combined with sharp analysis. Look for creative methods to enable your strategic thinking and conversations. Invite artists and writers to stimulate you, use metaphors and pictures to imagine the future, to help you to think outside of the boxes of the present.



## C.9 Management meetings

*“We haven’t had a management meeting for nine months!” My colleague complained.*

*It was true. That’s not to say that management discussions weren’t taking place regularly. But it was more a matter of who happened to be around, and who was near the boss’s office when an issue presented itself.*

*We’d talked about having a monthly management meeting. But we all travelled so much, that none of us had made this a priority, including the boss. A proposal was made that we should aim for a quarterly management meeting. It would be ‘offsite’. It would last a full day. Lunch was included. And there would be no agenda. We agreed that none of us would take holidays when these meetings took place. They would have to be a priority.*

*So, how did it go? Well, we were all determined to make it work. In fact, I remember one of my colleagues attending a meeting while suffering from Dengue fever, and so lying on the floor while raising an important issue. But more interesting than what happened in the meetings was what happened around them.*

*If donors were planning a visit, they were asked to come during this week. We would add another*



*day to our meeting at which all donors were welcomed. This became a regular part of the rhythm and it also freed the rest of our time from dealing with donors. Other meetings that required the input from all management team members were also scheduled for the same week. By establishing a rhythm for our management meetings, we not only made our lives easier, but we contributed to a rhythm amongst our partners as well.*

Meetings can become just an exchange of logistical information or focus too much on problems. To keep an element of learning in them try the following:

- Agenda items that are positive questions – how can we improve staff relations? How can we make this programme more effective? Rather than statements of 'the problem'.
- Give time for personal reflection or discussing an issue in pairs rather than launching immediately into a group discussion.
- Have a learning section – invite people to tell what they have learnt since the last meeting – this shows that learning is valued and invites discussion about how the learning can be applied.
- Watch a short film on an aspect of work and discuss what we can be learnt from it for your own practice.
- Have a section called ' what didn't work' and use it to show that talking about failures can help us learn. Transform failures into valuable learning.

Meetings often become rituals – and that is fine if it prioritises time for learning as in the example above. But if you start to sleepwalk through the ritual, perhaps you need to try running them in a different way to wake everyone up. Or have an annual or 6-month check up to see if they are still relevant and fulfilling the needs that they were set up to address.

*”The best way to have a good idea is to have a lot of ideas.”- Dr. Linus Pauling*