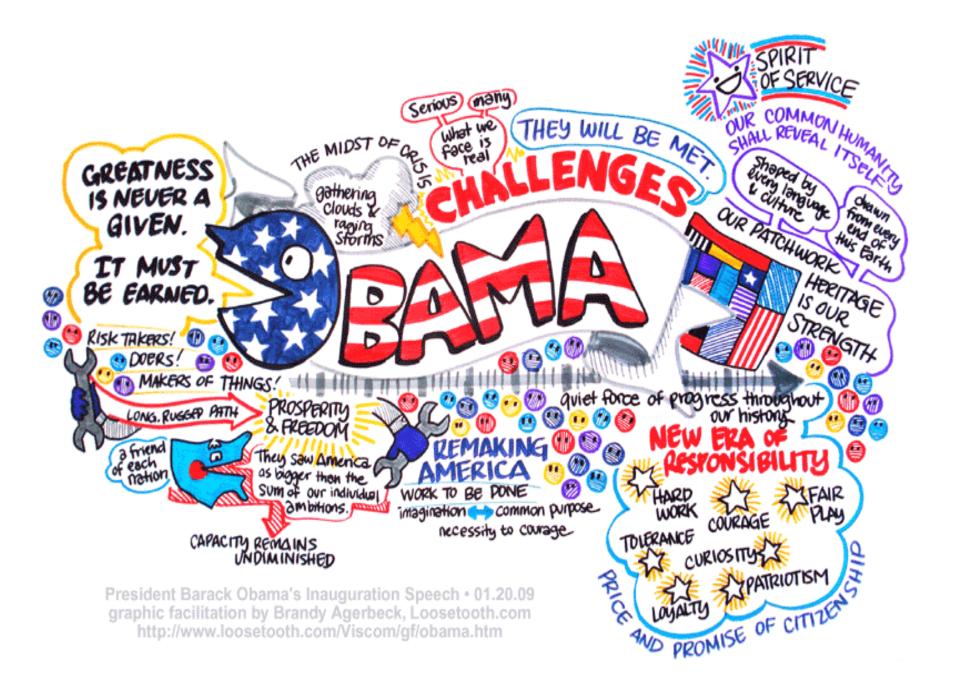
Graphic Recording and Organizing of Facilitated Sessions



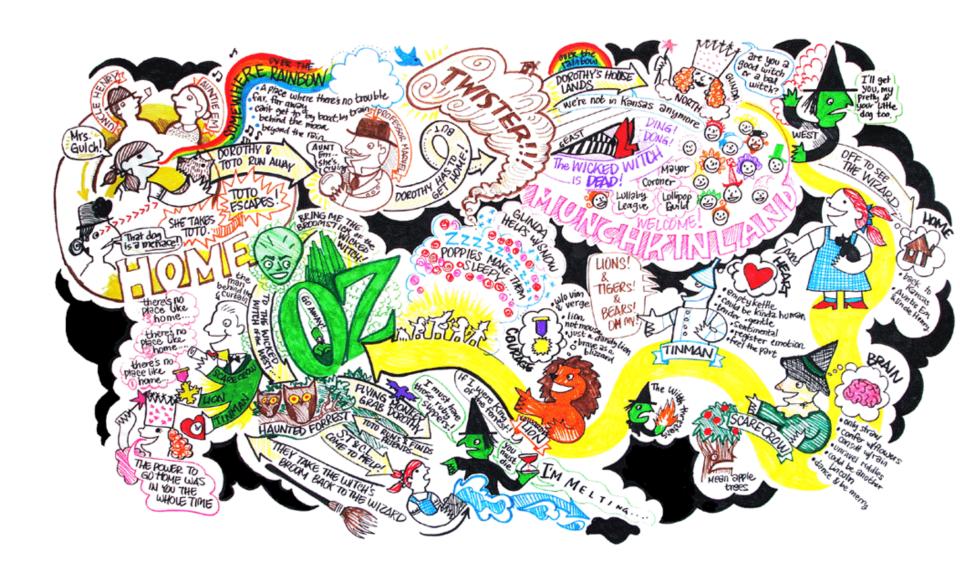
















marquerite casey foundation

RETREAT

Nov. 28-30, 2007

AGENDA

WEDNESDAY

Orientation/
Video

Welcome

THURSDAY

6 9:00am-10:00am

Our Change Continuum

0 10:00am to Noon

How We Work Together

BREAK

- © 1:00pm 1:30pm Context Moving Forward
- € 1:30 pm 4:30 pm
- Leveraging and Aligning Our Efforts

BREAK

7:00pm - 9:00pm
Team Building
Activity

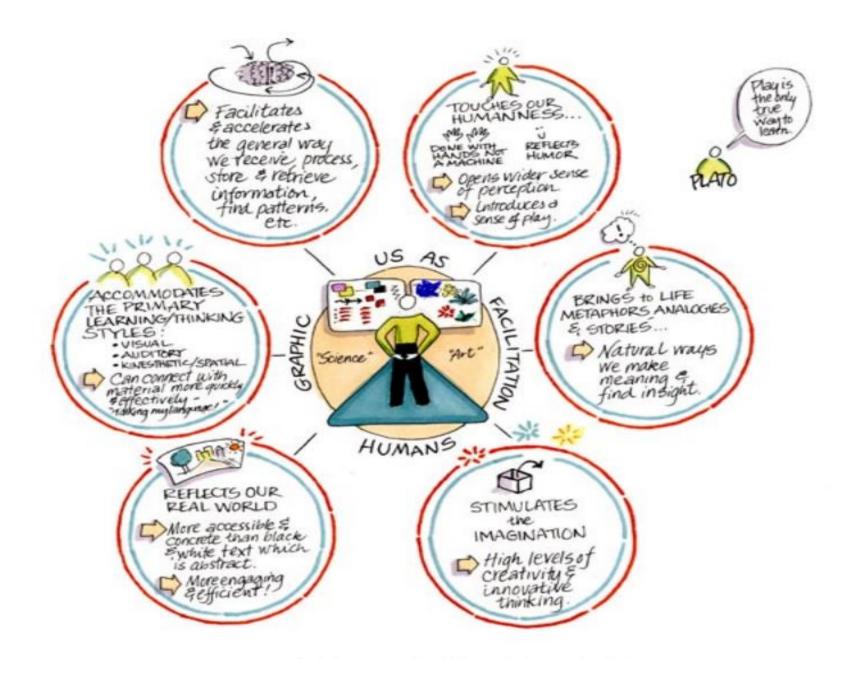
FRIDAY-

- 8:30am 10:00am
 Leveraging and
 Aligning Our Efforts
- 10:00am 11:00am
 - Recaps and Agreements
- CLOSING



OUTCOMES

- ➤ Concrete sense of how Team will work together and treat each other in doing the 'work'.
- Commitment and clear next steps for developing and nurturing a culture of inquiry. learning informed decision-making and continuous improvement.
- Collective understanding of the continuum along which change process occurs and agreement on key indices of progress towards realistic outcomes
- Articulation of Key priorities and strategies for FY2008 and programmatic and operational implications
- Next steps and conversations identified and prioritized



- Beyond Recording
- Charting
- Workshop Method Documents
- Mind Maps
- Fish Bone
- Matrix

THE DISCIPLINES OF THE LEARNING ORGANIZATION

	SYSTEMS THINKING	PERSONAL MASTERY	MENTAL MODELS	SHARED VISION	TEAM LEARNING					
Description	allows for the seeing of wholes and interrelationships rather than static snapshots. It is the process of removing boundaries within an organization and understanding its complexities. Its goal is to help people avoid the overwhelming feeling of resignation and victimization that they can't make a difference.	is the discipline of continually clarifying and deepening ones personal vision, of focusing ones energies, of developing patience, and of seeing reality more objectively. Rooted in Eastern and Western spiritual traditions, mastery is the way of connecting personal learning with organizational learning.	are deeply ingrained assumptions, generalizations, and images of the world, of the organization, and oneself that influence how we understand how things function. This discipline is the act of discovering those unconscious mindsets and opening them up to conscious change.	binds people around a common identity and sense of destiny. A genuine vision causes people to do things because they want to, not because they have to. Vision builders uncover pictures of the future that are common to all members and inspire commitment.	is a tool for raising the collective intelligence quotient of an organization above that of anyone in it. This discipline includes dialogue as a group and overcoming defensiveness that undermines group learning. Teams are the fundamental learning unit within an organization.					
Principles	holism interconnectedness leverage structure influences behavior	connectedness generativity vision structural tension vs. emotional tension	love of truth openness espoused theory vs. theoryin-use ladder of inference balancing inquiry and advocacy	commonality of purpose partnership shared vision as a hologram built on individual visions	collective intelligence alignment "dia-logos" integrate dialogue and discussion					
Skills	systems archetypes simulation intuitive sense	clarifying personal vision making choices current reality balanced with future vision	testing assumptions planning as learning distinguishing data from generalizations	visioning process acknowledging current reality listening to others art of facilitation	suspending assumptions surfacing one's defensiveness "practicing"					

Elements of an Effective Meeting

"Facilitating Basic Team Work"
July 29, 2010

PREPARATION	PURPOSE	LEADER	AGENDA	PROCESS	OUTCOMES
Coming to meeting	Clearly state	Meeting facilitator	Send agenda ahead of	Sharing in meeting	Something achieved
prepared	expectations		time		
		Someone in charge &		Everyone contributes	Participants take
Well-structured	Agenda in advance &	timekeeper	Topic focused		away newly acquired
ground rules	goal understood		discussion – no	Honesty	knowledge or skill
l la de sete a de ce con se le	Classicated	Meeting time	personnel talks	Questions of clarity	Nove store with datas
Understand your role	Clearly stated	concerned	Classicale	Questions of clarity	Next steps with dates
Right people present	objectives	Open-ended	Clear goals	People being	for delivery
Right people present	Objectives clearly	questions	True reason to meet	receptive	
Decision-makers are	stated	questions	True reason to meet	receptive	
present	Stateu	Well-trained group	Distribute agenda in	OK for observations	
p. 333	Clearly state purpose	facilitator	advance		
Right people at the	& outcome	10000		Deep analysis	
table		Well-facilitated	Well-prepared		
	Establish type of		agenda	Good communication	
Meeting held at a	meeting upfront	Taking good notes			
reasonable time (i.e.,				Active listening	
not 7am or after	Hope to achieve @			Doing museumt	
lunch)	the meeting			Being present	
	conclusion			Passion	
Safe environment				1 0331011	
				Participants are	
				engaged	
				2 0.02	
				Eye contact	
				Listening to each	
				other	

THE WALL OF WONDER

Associated Colleges of the March 21, 2007

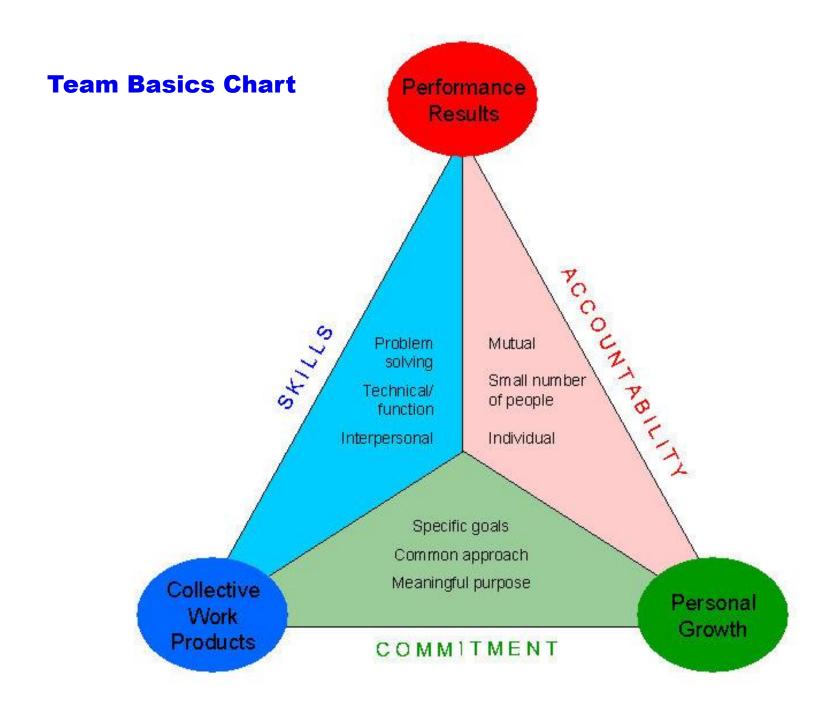
	50's	60's	70's	80's	90's	00's	Trends
The World in General	Cold War Rock 'n Roll McCarthy Hearings Baby Boom Interstate Highway System	Vietnam War Civil Rts. Movt. Moon Landing Sexual Revolution Beatles Sex, Drugs, Music	Bad Music (disco) Watergate Military Dictatorship More Cuban Missile Crisis Women's Mvt. Energy Crisis Rise of Conservatism	ME generation Computers Regan Revolution Conservative Movement	End of Globalization E-Mail Internet Gulf War I E-Commerce	World Wide Web Terror/War 9/11 War Rise of Popular Technology (MP3, YouTube, etc.) Baby Boomers turn 50/60	Technology Globalization Increased global conflict Cut backs in public finance Environmental stress Immigration movement
The Field of Liberal Arts Colleges	Rampant Conformity Elite Complacency GI Bill Growth of State Universities In Loco Parentis	Baby Boom Diversity Initiatives Protest Co-Ed Dorms	Loose requirements Government financial aid peaks Social Liberalization Rise of Careerism	Conservative Government Funding for Interdisciplinary Movement	Internation-alization of Curriculum Information Literacy Experiential Learning Technology becomes more widely available to college students	Globalization On-Line Learning Off-campus grows exponentially Tuition Discounting	Globalizations - of class-room, settings, on-campus p[programs Technology Cost of Education (decline of public support) Green Campuses Seen as a Private Good
АСМ	Founding of ACM Presidents meet to form ACM Athletic Cong. Small Assoc. of Presidents	First OCS Programs ACM began off-campus programs programs created with program money	Grants & started International programs multiply	Faculty Development Program Creation of New Programs Growth of Conferences more off-campus CAP & Russia Falling Enrollments on some campuses	Internet Communications Diversity Program (MSAC)	Global Partners Enrollments decline NITLE Instructional Technology New Officer New President End of and Urban Education Program	Search for efficiencies Decrease emphasis on off-campus study Drive to keep money on campus Short off-campus programs Tension bet/ haves and have-nots (less level playing field)

SITUATIONAL ANALYSIS Associated Colleges of the March 21, 2007

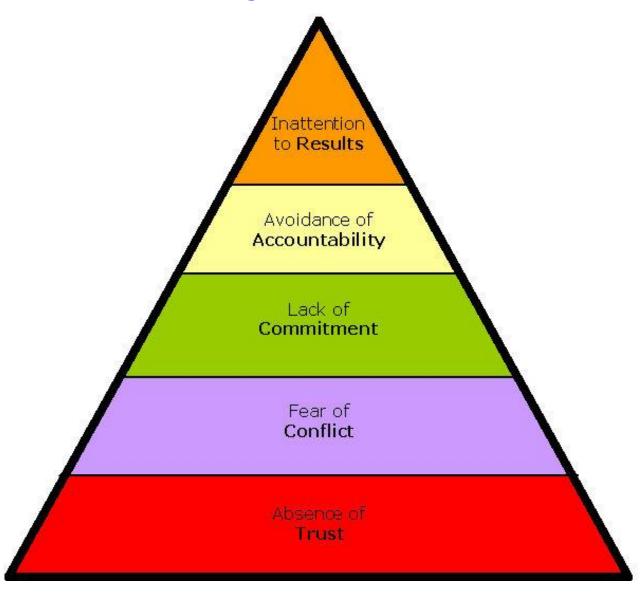
	STRENGTHS		WEAKNESSES		OPPORTUNITIES		THREATS
AA AAAAA AAA	Reputation and relationships Communication with high school students Diverse perspectives Reputation in off-campus study Reputation Relationships Shared values (liberal arts) Relationships: faculty, staff, administrators Reputation: trust and quality Relationships with campuses Faculty Development Initiatives	A A AA AAAA A	Lack of direction – where are we headed? Communication within office and in larger consortium Transitional phase Lack of communication / recognition Uncertainty about income Marginal status Communication in silos Uneven resources among members Deficits and high costs	A AA AA AAAAA A A	New collaborative opportunities Technology Financial pressures encourages collaboration Technology fosters sharing Location of schools around major cities New locations for OCS Additional members Transitional phase Re-branding More opportunities for students, beyond OCS program Change in staff (re-conceptualization) New programs; revitalize current programs	AA A AAAA A AA A	Varying campus agendas Anxiety/Distrust currently from people on campuses Deteriorating relationships with people on the campuses Speed of change Financial pressure Schools leaving the consortium Loosing market share of OCS program Change in Staff: loss of institutional memory and relationships Possible departure of members Stabilization within administrative office; all Pos leaving Intense OCS competition
Spi	<u>mal:</u> der :k of dogs nda			Wh	dscape: ite Water Rapids Iting Icebergs		

BRADFORD GROUP – SUPPORT PARTNERS "AGENCY-ORIENTATION" VISION

			, JEIN					
I. FOSTER A COLLABORATIVE ENVIRONMENT			I. S	CLARIFY TI TRATEGY COI		I. ARTICULATE THE WORK FLOW PROCESSES		
A. TWO-WAY COMMUNICA- TION STRUCTURE	B. PARTNERSHIP CULTURE	C. CONFLICT RESOLUTION PROCESS	D. WELL - DEFINED SERVICE OFFERINGS	E. CLEAR CORPORATE & BUSINESS UNIT STRATEGY	F. PRIORITY RESOURCE ALLOCATION PROCESS	G. BEST PRACTICES FOLLOWED	H. DEFINED & IMPROVED WORK FLOW PROCESSES	I. CONTINUOUS IMPROVE- MENT ORIENTATION
Communi-cate New Rules Concise Communications within Exec. level throughout organization Clear Communica-tion Network: Client to/from agencies Clients provide needed information	True Team Orientation with commitment well beyond exec. level Executive Partnership: mutual respect, trust, appreciation & realistic expectations Respect & appreciation that goes both ways Alternative views does not mean we are in conflict	Open Communica-tion and willingness to consider alternative approaches Mutual understand-ing of resource capacity & timeframes (reality checks)	Known value of our services We need to define our services Have known boundaries	➤ Understand the vision and competency of the groups we support and of how what we do can add value Agreement on corporate vision ➤ Goals/ Directions enterprise and BU levels ➤ Definition of core services of "sub-agency" units vs. overall principles ➤ Projects must be consistent with corporate goals	Clients must prioritize projects Prioritiza-tion of competing demands for limited resources Expressed process for priorities Realistic expecta-tions of time needed	Defined processes and authority on both sides of the structure Best Practices defined and kept Conflicting expectations of management vs. the marketing groups on deliverables	System modifications to support change and growth New Project Justification: process, resource allocation Work Flow clearly defined: chain of command, communication, etc. Defined project management and change management Be Proactive; don't wait for crisis Integration of priorities, process, & service delivery between support groups to meet the needs of the corp.	Regular Review of services, processes, and structure Hunger for a continuous level of improvement in service & efficiency We may need to reorganize our groups
3	4	2	8	8	2	2	9	1



The Five Dysfunctions of a Team



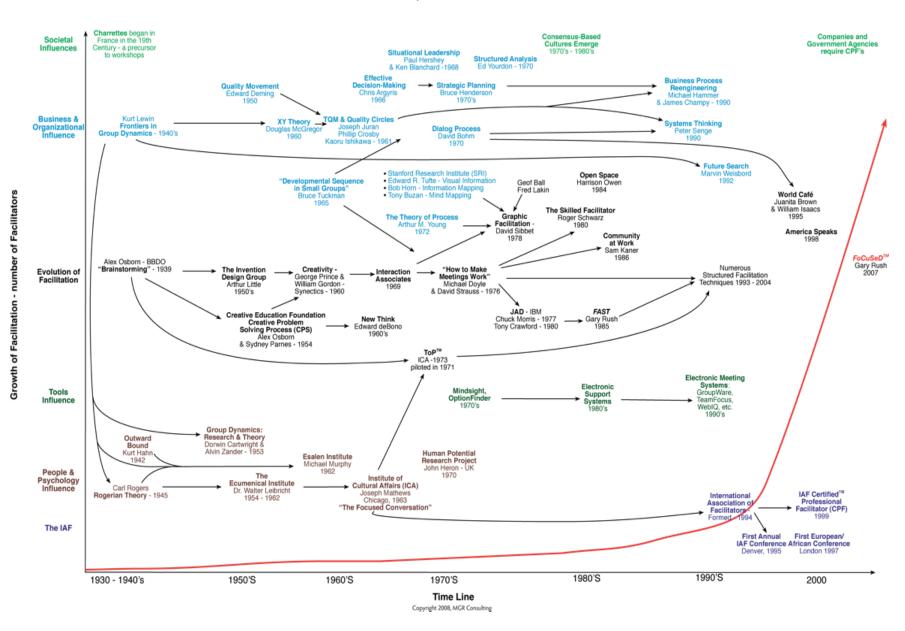
ADDRESSING THE DYSFUNCTIONS OF TEAMS

Dysfunction	Absence of Trust	Fear of Conflict	Lack of Commitment	Avoidance of Accountability	Inattention to Results				
Description	Weaknesses concealed Hesitation to ask for and give help Conclusion-jumping Failure to use others' skills Meetings dreaded	Boring meetings Internal politics thrive Controversial topics ignored Fail to tap into opinions Posturing	Ambiguous direction and priorities Consensual over-emphasis Revisiting previous decisions Windows of opportunity close	Mediocrity tolerated Deadlines missed Over-reliance upon team leader Varying standards of performance tolerated	Fail to grow Stagnate Achievement- oriented employees leave Over-emphasis on Individual careers and goals				
How to Address	Admit vulnerabilities Ask for help Accept questioning Give benefit of doubt Appreciate one another	Lively, interesting meetings Extract team members' ideas Solve problems quickly Minimize politics Put critical issues on table	Clarity about direction and priorities Align team around objectives Learn from mistakes Take advantage of opportunities	Pressure poor performers Question unhesitatingly Expect high standards Avoid excessive bureaucracy	Retain best employees Minimize individualistic behavior Avoid distractions Celebrate success Feel failure				
Methods	Personal histories exercise Personality profiles 360-degree feedback	Mining Real-time permission	Cascading messaging Deadlines Worst-case scenario analysis	Publication of goals and standards Regular progress reviews Team rewards	Public declaration of results Results-based rewards				
Role of the Leader	Demonstrate vulnerability and do not punish vulnerability of team members	Avoid premature interruption of disagreements Allow resolution to occur naturally, however messy	Be comfortable with making a decision that turns out to be wrong Constantly push for closure on issues	Allow the team to serve as primary accountability mechanism Serve as ultimate arbiter of discipline	Set the tone for a focus on results Be selfless, objective, reserve awards for those who deserve it				

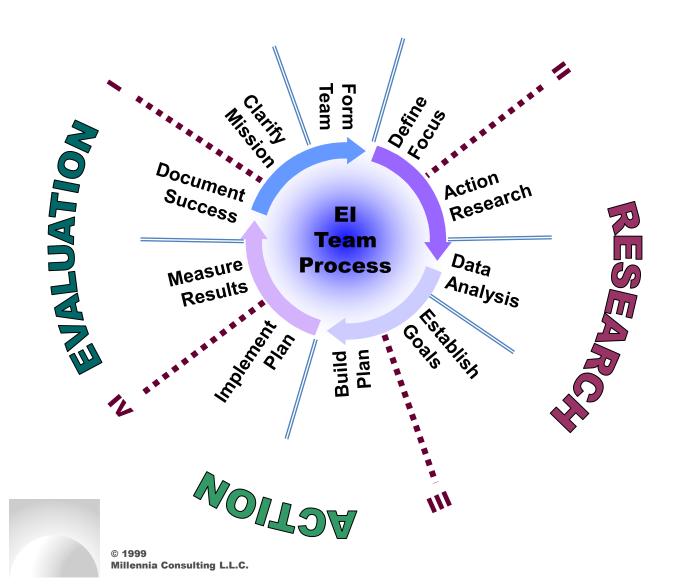
Adapted from The Five Dysfunctions of a Team: A Leadership Fable, Patrick Lencioni, 2002, SF: Jossey-Bass

The Development of the Field

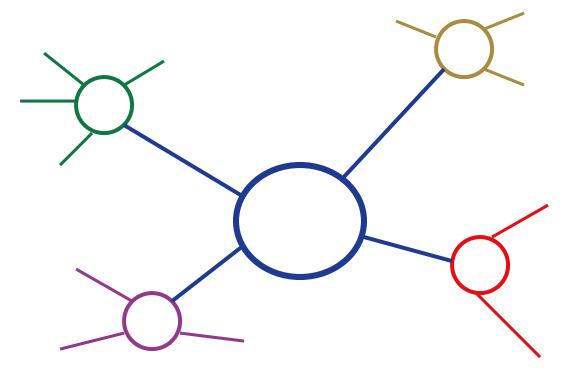
Events that shaped the Facilitation Profession



DEFINITION

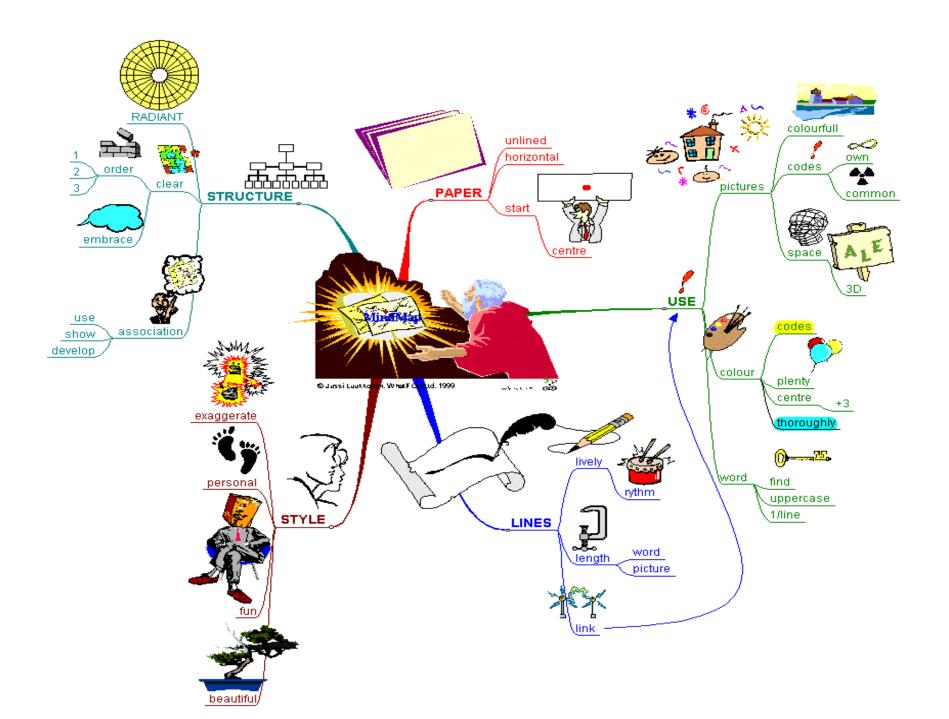


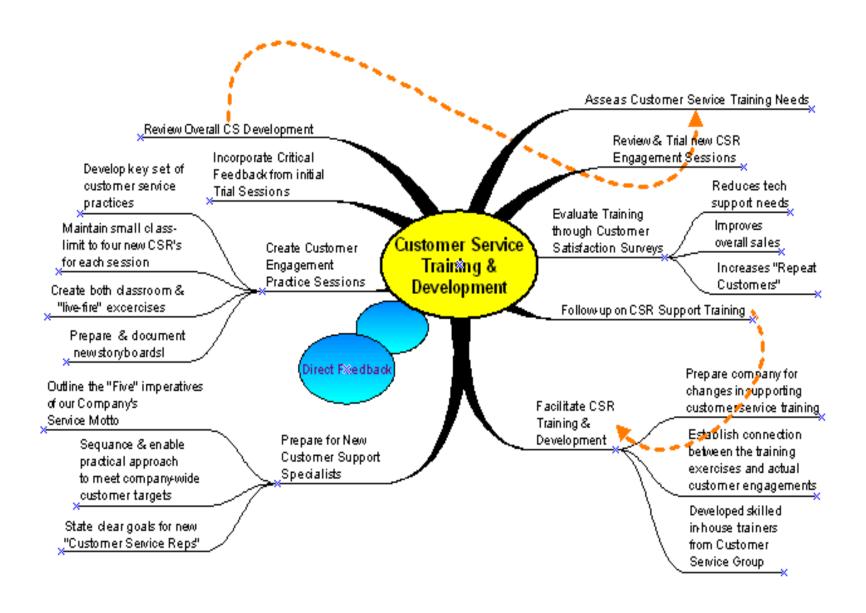
Program Monitoring DIRECT **MISSION Define Mission Effective** & Purpose **Planning ROLES & RESPONSBILITIES OF NONPROFIT BOARDS Enhance** "Court **Public Image** Of Appeals" **GUARD GUIDE RESOURCES STAFF** Support Personnel **Ensure Executive** Manage **Policies** Select Director Review **Adequacy Effectively** & Compensation

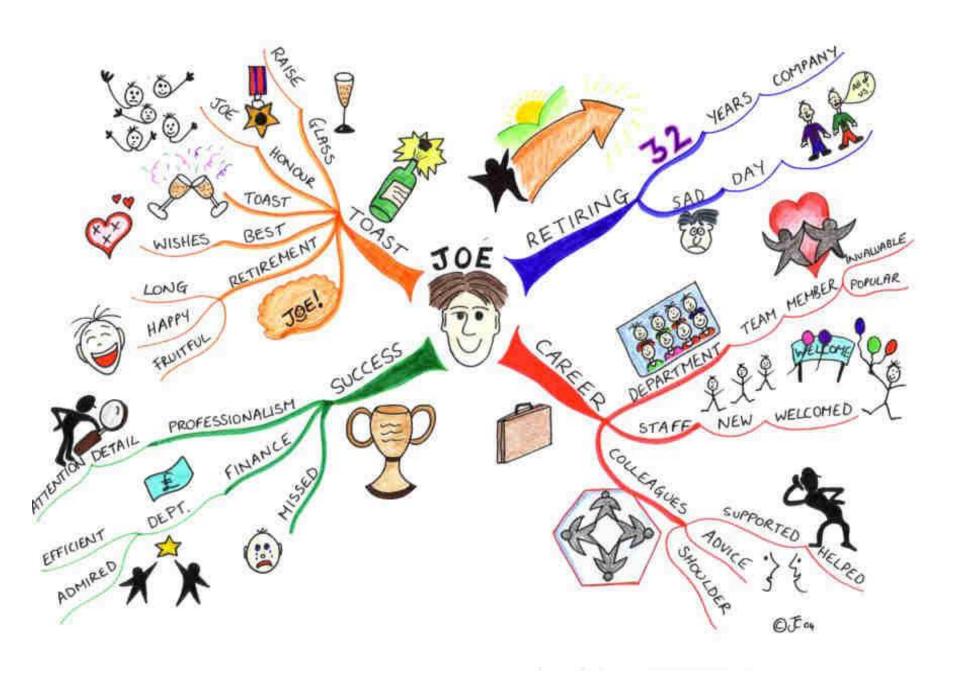


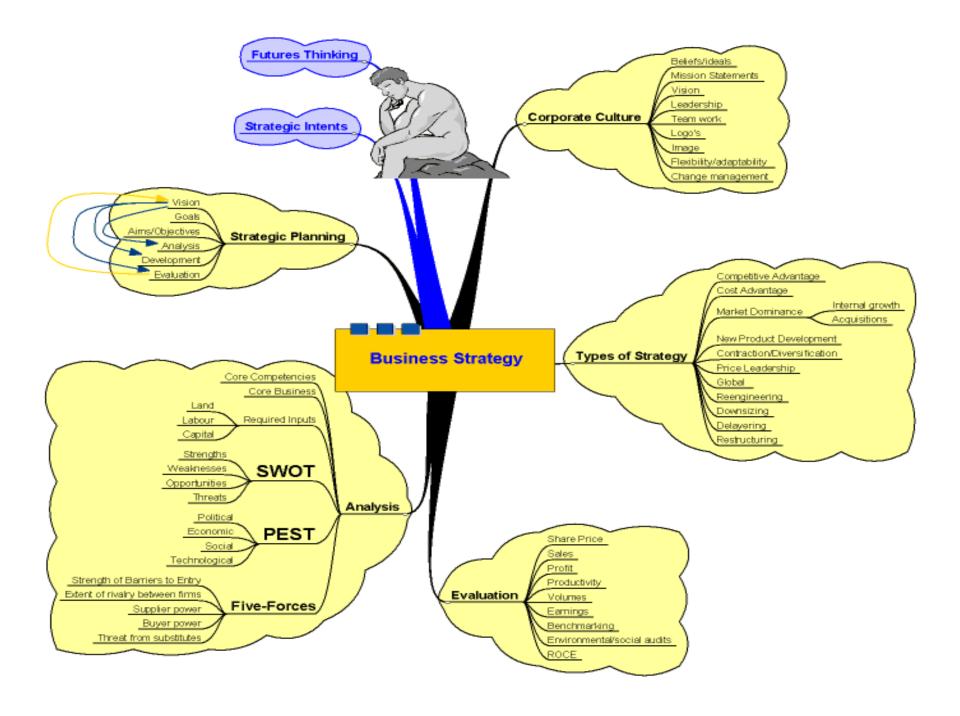
MIND MAP

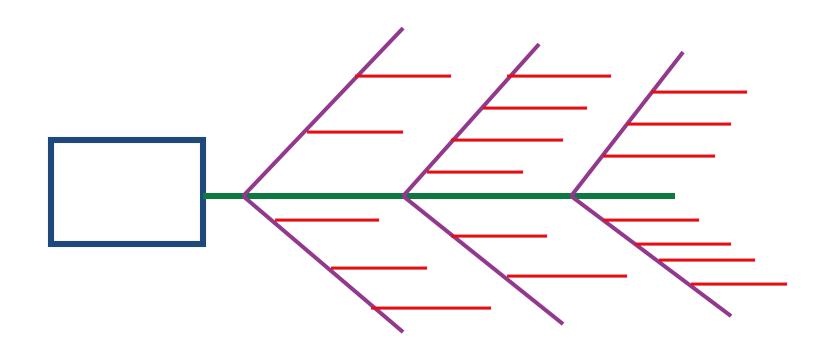












FISHBONE

MATRIX								

Figure Intro.3. Graphic organizers for higher order thinking

GRAPHIC ORGANIZERS FOR HIGHER ORDER THINKING SKILLS

© R. BRUCE WILLIAMS

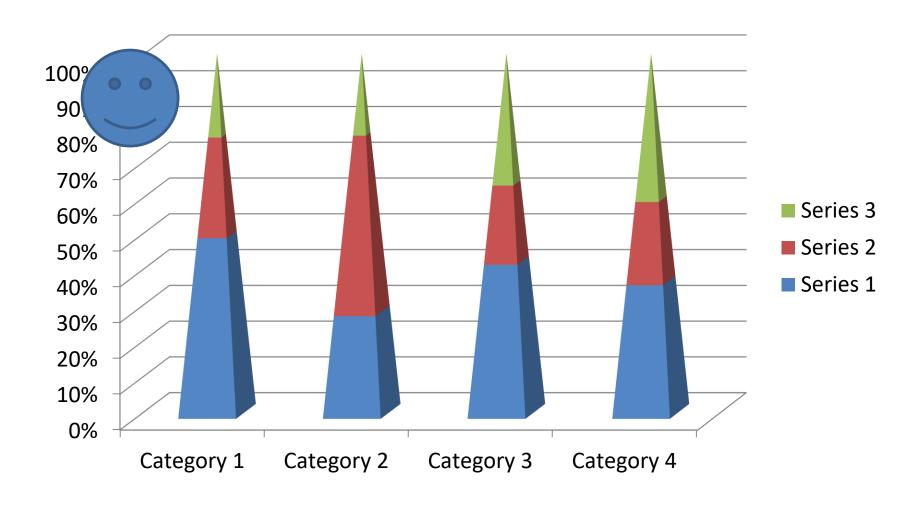
	Relevance- Contemporaneity	Richness- Complexity	Relatedness- Connectedness	Rigor- Challenge	Recursiveness- Concept	
Understanding Information	Comparing/ Contrasting	Classifying/ Sorting/Ranking	Connecting K W L	Explaining Why Who Why When Where	Analyzing	
Generating Insight	Evaluating/Judging +- +- +-	Creating/Visualizing/ Imagining Looks Sounds Feels Like Like	Forcing Relationships	Inferring Data Data Data Data	Making Analogies	
Discerning Implications	Applying Principles My Life	Innovating/Inventing Problem Issua Concern	Generalizing Principles Principle	Predicting/Sequencing	Transferring Sylvanian State	

From *Higher Order Thinking Skills*, by R. Bruce Williams. 2003, Thousand Oaks, CA: Corwin Press, p. 14.

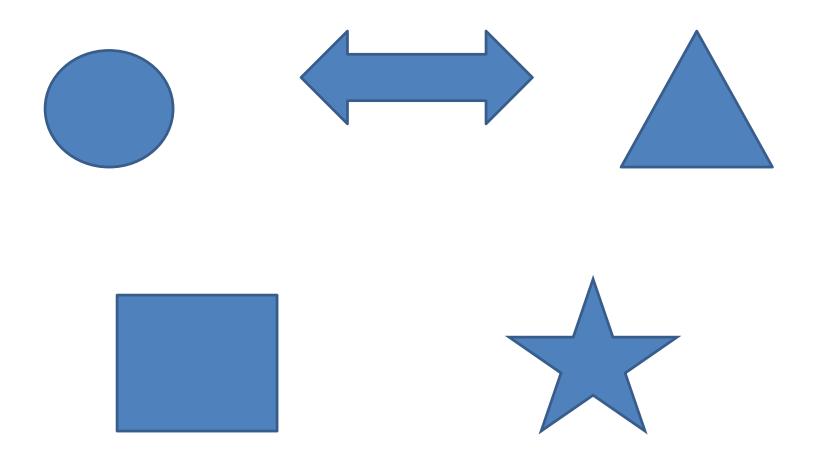


 "Not only are students able to practice numerous thinking skills with graphic organizers, but they are also able to organize their thoughts and to capture their thinking visually."

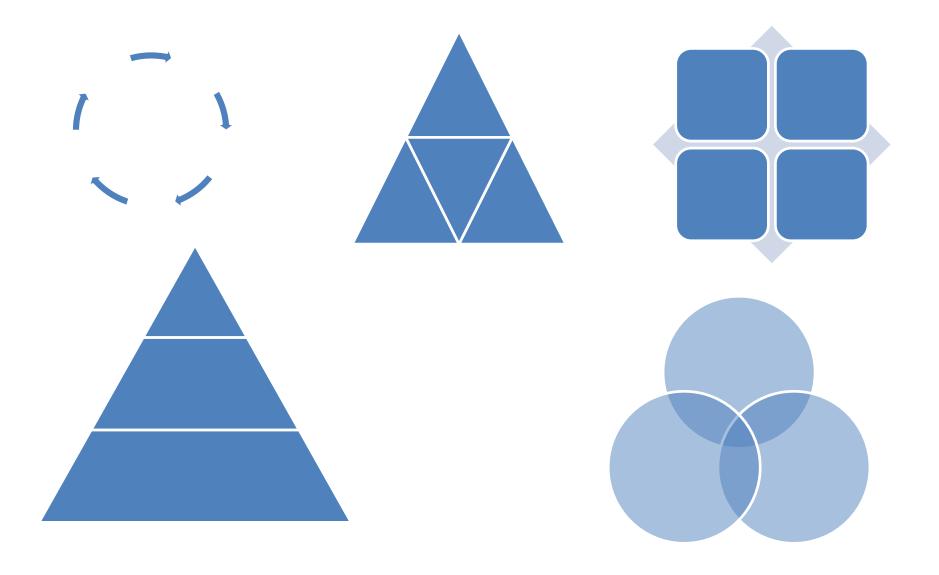
From *Brain Compatible Learning for the Block*, by R. Bruce Williams and Steven E. Dunn. 2008 (second edition), Thousand Oaks, CA: Corwin Press, p. 150.



Let's Try Some



A Few More



Faces et. al.









Graphic Facilitation

- http://www.loosetooth.com/Viscom/gf.htm
- http://www.idiagram.com/ideas/graphic_fa cilitation.html
- http://www.chart-magic.com/
- http://graphicfacilitation.blogs.com/

Graphic Recording

- http://www.donbraisby.co.uk/graphic recording.html
- http://www.theworldcafe.com/articles/grap hicBenefits.pdf
- http://www.visualpractitioner.org/