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“Never tell people how to do things. Tell them what to do and they will surprise you with their ingenuity.”

General George S. Patton

Becoming a Certified Professional Facilitator

“After 23 years of facilitating, on June 13, 2006, I became a Certified Professional Facilitator™ (CPF™). I believe that the CPF program run by the International Association of Facilitators (IAF™) is important for our industry and our profession. All facilitators should join the IAF and be assessed to become a CPF. Check out the IAF website – www.iaf-world.org – for more information.

Why?

Becoming a CPF gives you the opportunity to be assessed and receive feedback from your peers, which is very valuable. They also become a valuable network resource. In addition, you receive professional recognition that gives you pride and a competitive advantage. Some organizations will not hire facilitators unless they are a CPF.

How?

To become a CPF requires following the process outlined as well as meeting the competencies defined by the IAF.

The Process:

This is a 4-step process:

1. Get Trained.
2. Gain Experience.

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September 2006 NEWSLETTER

This newsletter describes Becoming a Certified Professional Facilitator and *The FAST Facilitator Manual*.

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www.mgrconsulting.com

Note: Beginning in 2007, we will send newsletters only via email. Have your colleagues send us their email. Email Gary at:

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3. Apply for Assessment.
4. Be Assessed.

The reason for the 4-steps is the Assessment Process. That process reviews your training and experience as part of the assessment.

1. Get Trained

In being assessed, the applicant documents how he or she was trained and what experiences were gained over the past three years. Training may have taken place prior to the three years, but the relevant experiences are during the immediate past three years. In the training, the assessor is looking to see if the candidate Facilitator began with legitimate training – rather than learning as you go. Looking at the competencies that I describe later, becoming a professional Facilitator without proper training is impossible. This is true of becoming a Project Management Professional (PMP[®]) or any other professional skill today. People who claim to be Facilitators without having been trained make too many mistakes, which affects the outcome, and develop too many bad habits, which hinder the process, overall turning the client off to the process.

2. Gain Experience

The application for CPF requires that you document 7 workshops that you have facilitated during the past 3 years. A properly trained facilitator should be able to apply for assessment after the first 7 to 12 workshops. This experience is important in applying what

you learned in training and knowing how it works in the real world. Experience also helps you achieve some of the competencies that are not covered in training (more on that later).

3. Apply for Assessment

Now that you've been trained and gained experience, it's time to let your professional peers look at you and see if you measure up. This is the easy step. Join the IAF and request the application forms from their website – www.iaf-world.org. The application requests contact information, training, experience, and resume. This takes about 3 hours to complete because they ask you to describe 7 workshops briefly and 1 in detail. You submit this application with your fee and then wait for the initial assessment.

4. Be Assessed

This is a 2-step process:

1. Documentation Review – initial assessment.
2. Assessment Day.

The Documentation Review is a review of the application you submitted. Your application is assigned to 2 assessors. The assessors are looking for evidence that you have the proper training, proper experience, and the required competencies. The result is either a “pass” with an invitation to the Assessment Day, or a “defer” with feedback as to why the assessors feel you need more training or experience and in which areas.

The Assessment Day is the second step of

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the process. This occurs at a scheduled IAF event usually 2 or 3 days prior to the event. When you are invited to Assessment Day, you are given information regarding a Case Study and your 2 assigned assessors – this is sent to you weeks in advance of Assessment Day. You are responsible to prepare your Case Study as if this were a real workshop and contact the designated assessor as if he or she were your client.

During Assessment Day, you first meet with the other candidates and all the assessors. You find out the schedule for the day. The assessment begins with an interview. Your assigned assessors interview you for 30 minutes. They are looking for clarification regarding your application ensuring that you have not missed anything and that you have gained the competencies required. After the interview, you and your fellow candidates participate in the Case Study workshops facilitated by each other. Other candidates are your participants, along with 2 other assessors. Your assigned assessors evaluate your performance when you are facilitating. You will facilitate for 30 minutes. At the end of that time, another candidate facilitates and you participate. The final portion of the day is a second interview. Your assigned assessors are looking for answers to any missing competency or clarification regarding what you did as a Facilitator. This lasts 30 minutes. At the end of the second interview, you are told whether you “pass” or are “deferred”. Out of the group of 27 candidates who were assessed with me, 3 were deferred. About 3 weeks later, you receive detailed confidential feedback on your performance. This feedback is very complete and honest.

The Competencies:

The Competencies that must be achieved to become a CPF cover 6 areas:

1. Create Collaborative Client Relationships.
2. Plan Appropriate Group Processes.
3. Create and Sustain a Participatory Environment.
4. Guide Group to Appropriate and Useful Outcomes.
5. Build and Maintain Professional Knowledge.
6. Model Positive Professional Attitude.

The first 4 are taught before you facilitate. The last 2 address your attitude, professionalism, and on-going education as part of the profession as a Facilitator.

1. Create Collaborative Client Relationships.

This competency addresses the Facilitator’s relationship with the client – largely before the workshop. Does the Facilitator prepare properly by talking with the client to define outcomes, roles, and commitment? Does the Facilitator diagnose what the client needs and develop processes to correct any problems? Can the Facilitator contract properly with the client and manage multiple workshops? The Facilitator must interview clients properly; meet the client’s needs (i.e., not design processes that don’t address a need), and ensure that what is being delivered is what the client wants.

2. Plan Appropriate Group Processes.

This competency addresses the facilitator’s ability to design and select the

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right processes and tools that not only deliver the agreed to outcome, but also support a diverse group of people, cultures, and thinking styles. Does the Facilitator take into account the varied participants? Does the Facilitator plan the physical space and time to support the needs of the group? Facilitators must understand their audience – the participants. Facilitators must become familiar with the workshop space and make them work for the group.

3. Create and Sustain a Participatory Environment.

This competency addresses the ability of the Facilitator to manage communication, conflict, creativity, and participation. Does the Facilitator use a variety of processes? Does the facilitator actively listen? Can the Facilitator manage conflict effectively? Facilitators must know how to listen, how to enable the creativity of the group, and how to manage conflict all while ensuring that everyone has an equal opportunity to participate.

4. Guide Group to Appropriate and useful Outcomes.

This competency looks at the Facilitator's ability to execute the designed processes. Can the facilitator guide the group without manipulating? Can the Facilitator keep the group on track? Is the Facilitator able to vary the pace and keep everyone engaged? Can the Facilitator get the group to consensus? These are the skills related to the sensitivity and flexibility of the Facilitator with the group and the Facilitator's ability to execute the processes or adjust as needed by the group.

5. Build and Maintain Professional Knowledge.

This competency speaks to the professionalism of the Facilitator. Does the Facilitator build a base of knowledge surrounding the profession? Does the Facilitator know more than one method? Does the Facilitator continue to learn and be part of the profession? Facilitators who use one method and never grow become stale. New ideas are developed continuously. We never have all the answers and need to stay in contact with other Facilitators.

6. Model Positive Professional Attitude.

This competency looks at the Facilitator's ability to remain neutral, act with integrity, and be self-aware. Does the Facilitator remain neutral? Does the Facilitator demonstrate a belief in the value of the group and what it can do? Can the Facilitator recognize his or her own limitations and adjust as necessary in support of the group? This is important because, as Facilitators, we set the tone. We model behavior that avoids, "do as I say, not as I do." We do as we say.

To Paraphrase

When I look at the 6 competencies, they boil down to knowing how to deal with people, manage the process, and model attitude. To do that, Facilitators cannot just walk in and facilitate a workshop without knowing whom they are facilitating, what their needs are, and what the issues are. Facilitators must prepare properly. Those who don't prepare properly are doing a disservice to their clients. I teach my students to interview every participant and what to look for before the workshop.

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Preparation is not a luxury – it is mandatory. Preparation includes identifying which tools and processes are required to make the workshop successful. Preparation includes creating what I call an Annotated Agenda – a detailed plan for the workshop. This ensures that the Facilitator has thought through the process, is ready to facilitate it, but is able to be flexible. Adequate planning enables flexibility. Poor planning inhibits flexibility.

The workshop requires that the Facilitator know how to handle what the participants do. Active listening is our most important skill as a facilitator because it enables communication and helps manage conflict. Knowing how to deal with the different personalities requires confidence in your ability and belief in the possibilities of the group. I teach that if you treat people with respect, they respond with respect. That helps with managing the people and in

remaining neutral. Believing that you have the proper process and the best participants makes it easy to remain neutral because the right process and the right people always produce the right outcome.

Summary

Training and experience are needed to become a professional Facilitator – certainly a Certified Professional Facilitator. How to achieve the competencies can be taught. I cover every competency and tools to support them in my MGR Consulting - *The FAST Facilitator Workshop*. I believe in these competencies because they make facilitators better, they ensure that clients benefit, and they help make facilitation a profession. I strongly encourage every Facilitator to ensure that they have the best training, practice, join the IAF, and become a Certified Professional Facilitator. ☸

Announcing The *FAST* Facilitator Manual

MGR Consulting is proud to announce our new *FAST* manual - *The FAST Facilitator Manual*.

The original *FAST* manual - *FAST* Session Leader Reference Manual was written in 1985 with many updates until 2004.

The FAST Facilitator Manual key factors:

- 732 pages of information.
- 170 illustrations.
- New agenda for Process Design.
- New section on Conflict and Confrontation.
- New Graphic Tools for reference.
- New Case Studies that enable both Business focus and IT focus.
- Enhanced Presentation Skills section.
- Consistent reference and methodology wording.
- Guidance on implementing facilitation in your company.
- A tie to the CPF™ Competencies discussed in the previous article.

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Announcing The *FAST* Facilitator Manual, continued

The new manual will be provided to students of *The FAST Facilitator Workshop* – public and in-house. Alumni only may purchase a copy by contacting Gary Rush directly and we will invoice your

Company. You may also send a cheque payable to MGR Consulting. The cost of each manual is \$250 and includes standard domestic shipping. You should receive your manual 2 weeks after we receive payment.



PUBLIC CLASSES

Class	The <i>FAST</i> Facilitator Workshop	Leadership Skills	Diversity – How Business Succeeds
Description	Our 5-day class that provides the finest and most comprehensive facilitation training available. The audience is candidate facilitators. This class confers 32 PDU's.	A 3-day class providing leadership skills and tools for the budding leader. This audience is anyone looking to become a leader. This class confers 18 PDU's.	Our newest class is a 2-day class that enables students to understand diversity and “inclusivity” as well as implement or support diversity programs. This class confers 12 PDU's.
Cost per student	\$2600	\$1890	\$760
Class Dates	October 16 – 20 December 4 – 8	November 6 – 8	November 9 – 10

Gary Rush teaches all classes.

All class fees cover training, materials, continental breakfast, lunch, and breaks. Hotel room reservations at the Majestic Hotel, 528 W. Brompton, Chicago, IL 60657 are made through MGR Consulting. Student pays own hotel and incidentals – a credit card is required to hold a room. Room rates and terms are listed on our web site (*Public Classes*). If you do not want to stay at the hotel, please let us know so that we don't make a reservation for you.

See our web site for: Facilitation & Consulting Services, Classes, Newsletters, Articles, and Resources.

Call Gary at (773) 330-2064 to register, for additional information, pick his brain, or schedule a class. You may email him at grush@mgrconsulting.com www.mgrconsulting.com