



# The organisational impact of facilitation skills

Bella Mehta



## Keywords

Organisational Change, Humanistic Psychology, Organisational Impact, Gestalt, Sophisticated Work Groups, Group Process, Association of Facilitators

## Introduction

I am one of the several original co-founders of the [Association of Facilitators](#) (AoF). Our offering grew out of the humanistic psychology movement, in particular the work of the Human Potential Resource Group at Surrey University, the emergence of Facilitation Styles training, and the integration of [Gestalt](#) approaches into organisational development.

This article attempts to describe the principles of facilitative working that seem to generate a positive impact within organisations. I do not intend to dwell for too long on what a facilitator is, does or should do. This is brought to life more clearly in writing elsewhere (others' and our own - [AOF](#)), our training course offerings, and is well-represented by [AoF's competency model, FACETS®](#), developed by my AoF colleague and co-founder Brian Watts.

The principles I write about have emerged over years from organisations and groups as 'figures of interest', telling us what we do that has impact for them personally, for their team, for their organisation and in their wider life. These themes, arising from feedback, seem to point clearly to what is often missed in (or missed out of) working life. So, with my essentially positive, optimistic and humanistic proclivities, I believe that these themes have great potential for us to create human-centred places of work.

## Writing this article

As this issue of *e-Organisations and People* (e-O&P) invites writing in the auto-ethnographic style (e.g. Weil, 2008), I offer upfront my strong sense that my contribution to organisational change as a facilitator is more impactful than other configurations of "helping teams and people" I have tried. These include being a management consultant and project manager as well as being a coach, mentor and trainee therapist. No doubt I have learnt from and integrated aspects of all of these roles into my personhood and also there are aspects of my history and preferences that mean the 'facilitator configuration' is the best fit for me, here and

now. Also, doubtless my style will continue to evolve as my views and values do and as I experience, with others, moments of transformational change as well as periods of immunity to change.

For several years, I have been reluctant to write about our work for several reasons (beyond the usual procrastination and busy-ness!). These include:

- Facilitation is a relational process involving an organisation, group or individual and a facilitator. In writing about my own experiences, I have also tried to represent the voices of those I have worked with. These are true representations which are as far as possible, are included with context and depth, but inevitably fall short of a second-person view on this first-person description.
- I have an aversion to reading articles where an agent of change, such as a facilitator or consultant, acts upon a system, such as a department or team, to produce an inevitably positive shift through his or her (highly skilled and clearly discernible) actions, charisma or presence. This polished style invites a hurrah for the facilitator, or a purchase of the book, course or consultancy while glossing over messiness and complexities of personal contributions, journeys and 'colour'. I fear I may reproduce this style of article by mistake!
- The work isn't only my work – the process by which I facilitate, or the values that I express when I facilitate, are not just "my way". I am learning continually from my colleagues, clients, group members, others who have facilitated my learning, authors whose books I have read, back through my personal history to Greek philosophers and beyond. So the process or case studies are never fixed or complete, but rather a reflection of time.

I was persuaded to pick up the pen by personal knowledge of Steve Dilworth and many quality conversations with him about both facilitation and writing, and by [AMED](#) dedicating this issue of its journal *e-O&P* to facilitation. Also, I read so avidly and keenly and find it a key pillar of my continued learning that it seemed disingenuous in some ways not to offer something, as someone who is interested in facilitation, reading, writing and sharing experiences. So, this article and the facilitative AMED framework have helped me wrestle with some of my objections, and I reframe these self-quarrels in service of my own learning and that of others.

### Experiencing positive impact

It is difficult to pinpoint "positive impact", but its ripples would definitely include greater learning, happier people, achieving shared goals, more joy and greater kindness (Nye 1995).

Having shared my reticence and ambivalence above for context, I have included below part of an email to me from a member of a client group I worked with over a couple of months. In it, she includes her (unsolicited) reflections on the day. This email, memories of her and her group, and other similarly well-received work, together paint a picture of what I mean by positive organisational impact:

*"All in all the presentation seemed to be well received and if I am honest I think we surprised our chief executive (in a good way). I think the way that Phil pulled the presentation together on PowerPoint helped enormously and I need to take some tips from him..."*

*Thank you for your comments. I think the task was quite ambitious and I am impressed that we managed to pull it off and have the presentation pretty much ready on the day.” ...*

*“I think these two sessions with you have been invaluable and if it had not been for the first session in particular I do not think we would have achieved the task at least not to a level we would have wanted.*

- *You have given us structure which I think we were lacking as a group.*
- *I think we are a “team” now rather than a group of people that work together.*
- *You have got us to look at our own behaviours and the behaviours of others within the team.*
- *We are now hearing from each team member rather than some more than others, encouragement has been given and we are more open with ourselves and each other.*
- *You have highlighted where some of us have ended up in a position where we do not defend ourselves or challenge things that come from the Executive. We are all adults after all and were employed for a reason to do our jobs. Empowerment has been lacking for some of us!!*
- *We have proven we can work together and work together well to produce results.”*

She adds a P.S.

*“P.S. Normally I would have sent a brief response to you because “I had too much other stuff to do” which I have, but this is important and warrants time for a long-term view. My behaviours are starting to change...”*

How might facilitation help such positive impact to come about?

## **Enquiring into positive impact**

In the last few years, at AoF, we have been engaging in practitioner-research (Barber 2006) into how facilitation skills support positive organisational impact and - its twin concept in our model - personal presence. This followed many reports of changes in both the inner and outer world of facilitators who we worked with in a training capacity and teams who we worked with as facilitators. We are of course familiar with the “just been on a training course/away day syndrome” where enthusiasm, engagement and optimism are high but perhaps not yet grounded. As a check point for this article, we specifically enquired into the experiences of the twelve members of an in-house Facilitation Network following a six-month action-learning based programme facilitated by us. Although this network is largely self-managing, we are still alongside the organisation and the embedded network at certain points, such as the one-year review, which took place in January 2018.

Gathered together with the experiences of this network are the past and current stories of those from many organisations (over 100), large and small, charity and FTSE100, local and global, who we have worked with, sometimes briefly and as individuals and sometimes as ongoing groups over several years. With our relational frame of reference, we consider impact to be a two-way flow (see Figure 1 below).



Fig 1: A two-way flow of facilitative impact

At its best:

- The facilitator impacts the individuals, group and organisation they are working with and/or part of.
- Working with individuals, groups and organisations impacts the facilitator's wellbeing and development

We consider that positive impact is holistic, long-lived and involves changes in mindset as well as skills. Over time, personal discoveries and darker shadow material are assimilated, integrated, embodied and characterized and the change can be both “seen” and “felt”.

### What does a facilitator do?

Many of the people I meet outside my world of ‘work’ (and more distant reaches of my family) don’t understand what a facilitator “does”. Some have the impression that facilitators administrate, charm, entertain, cajole, mediate, neutralise or bully a group into doing what it should have done all along (like we know!).

It has often struck me as significant how often groups express how surprised they were that we “just sat down and talked with them”, “really listened to what it is like for us” or “opened up space for them to really think”. Behind this simplicity is our dedication to person-centred principles, dialogue and working with what-is rather than what-should-be. Any such list of principles or description of style, tools or theories, however, provides only part of the answer to the question of what a facilitator does and doesn’t capture the depth, breadth and range of change that we witness in our work.

My consistent experience is that facilitation can lead to transformational change and long-lasting impact for people, groups, communities and organisations. Working facilitatively, we explicitly place awareness, culture, values, ethics and relationships centrally, when these are most often treated as peripheral or optional. No doubt there are consultants, trainers, supervisors, leaders, managers, therapists, change agents, artists, scientists (and so on) reading this article who also work in this way. Whatever we call ourselves, my sense is

that the facilitative work that we are all doing meets a deep and often unarticulated need around human purpose, human potential, high performance, connection and relationship.

### **Organisational Impact – can we improve on 30%?**

“Organisational Impact”, as well as being part of the title of this article, is also the name of a module we offer on our Certificate Programme in Facilitation Skills. This two-word title could equally describe Social Action, Community Development, Team Coaching, Group Process, Action Learning Set, Organisational Development (‘OD’), Human Endeavour, Public Service and so on. In each case, you can see that in our picture of working facilitatively, in addition to the facilitator, there are (1) a group of people and (2) a shared developmental purpose in a positive direction.

A McKinsey survey in 2008 upheld John Kotter’s 1996 findings that only 30% of organisational change programmes succeed. Lack of success in itself can fuel cynical thinking and further failure, although this disappointing figure is clearly not “all in the mind”. The devastating cost that human beings pay as a result of failing systems and unfit organisations is all around us and the distress of seeing it and feeling it is rarely far under the surface.

Gareth Morgan (1986) offers several metaphors for organisations, ranging from machines, brains, computers, instruments of domination and psychic prisons to organisms and cultures. AoF is most aligned to his view of organisations as “flux and transformation” although we work with people who view their organisations in different ways, such as those outlined above. Sometimes our impact lies in getting people to simply see and question how they view their organisation and their place in it and adjust to different ways, less bound ways of seeing themselves and others.

### **Emerging figures of interest**

There simply cannot be one way of addressing change which fits all organisations and people. Clearly we (humanity) haven’t found an answer and I am certainly not claiming here that we (AoF) have. Approaches to change will always be matched with our contextual understanding of the world and our prevailing worldview is that the world is interconnected, relational and emergent. Given this, I have expanded on several figures which emerge as being ‘of interest’ when I consider how we have impact.

### **Power and Diversity are key**

Aristotle’s political ideas provided “a means of creating order out of diversity while avoiding forms of totalitarian rule” (quoted in Morgan, *ibid*). The connections that Aristotle made back then - between the individual and the collective and between external control and internal satisfaction - are ones one that most of us working in organisations (the modern equivalent of Greek city-districts?) will recognise today.

The work of John Heron (2001) has much to offer about working with power in groups. His “modes of authority” model describes how a facilitator can be in a place of hierarchy, cooperation or autonomy, and depicts this as a scale with intermediate positions (see Figure 2 below). At the former end of the scale, the facilitator directs the group, make decisions and choose for the group (‘leads from the front’). At the other end, the group chooses its own learning and direction and the facilitator is a ‘group resource’.

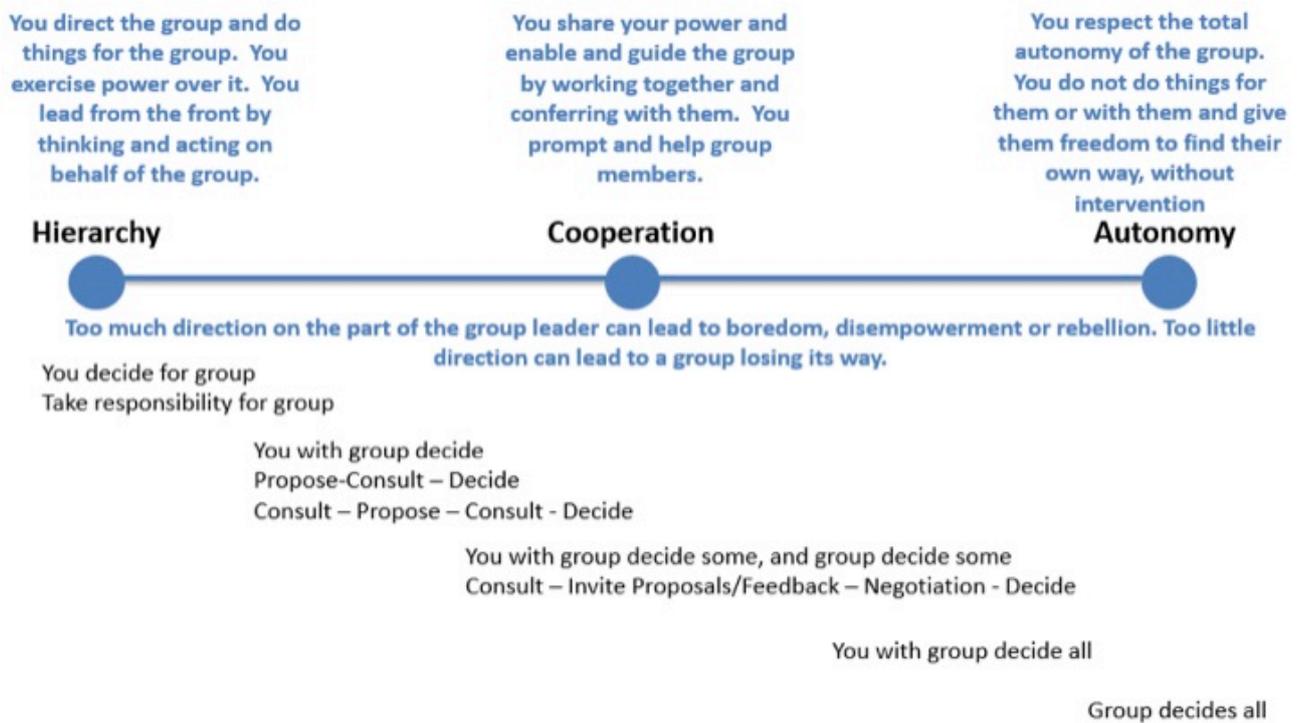


Fig 2: Heron's three modes of authority

In itself and on its own, this is a very practical model to help facilitators increase their range and act with intention and awareness. Our work is highly experiential so we have seen facilitators making sense of this model in many varied and rich ways, often starting from previously unseen rules and limitations (“I don’t... I can’t... I long for... I must... I should...”).

- Exploring their own relationships to power positions and personal dynamics (“I don’t want to be in charge”, “I want to be a likeable facilitator”, “Facilitators must cooperate”, “Facilitators are neutral”, “I can’t know more than someone senior to me”).
- Noticing power hierarchies (“I can’t say that because my boss/team is in the room”, “The customer/market is king”, “why don’t they just do what I tell them to do?”)
- Exploring their own unique preferences, skills and abilities and ability to contribute (“My natural style is x but I can stretch to y”)
- Expressing conscious feelings and becoming aware of unconscious feelings about themselves and others (“I don’t want to look incompetent in the presence of others”, “I can’t say what I really feel”)
- The influence of the wider systems – family, historical, social, numbers, psycho-social (“I don’t belong here”; “My role is to be the one who...”).
- Ethical observations and explorations (“Who am I to impose my philosophy and style on others”, “What if I don’t agree with the purpose or values of this group?”).

We see confidence and competence increase when facilitators explore this model experientially as they discover for themselves an extended range and greater possibilities to offer their groups through autonomous learning and conscious hierarchy.

Significant systemic and personal pressures, particularly those of diversity and inclusion, can be made visible by exploring power relationships. For example, differentiation at the forming/storming stage, necessary to move forward into performing/norming stages (Tuckman & Jensen 1977), is often welcomed by the lower power group who *know* they are different from the prevailing norms but which are resisted by the higher power group (“we’re all the same”, “you’re one of us”, “we’re all human”) which maintains the status quo.

For the richness that this offers, exploration of power and diversity dynamics is key to organisational impact and also to lifelong learning.

*“I intend to reflect and build further on the mode of power model. I am keen to move away from a natural default “hierarchical” style where I feel I can box myself in to incorporate the other modes ... with an emphasis on building greater connection...”*

Open Course Participant – Self Assessment

## Learn From Experience

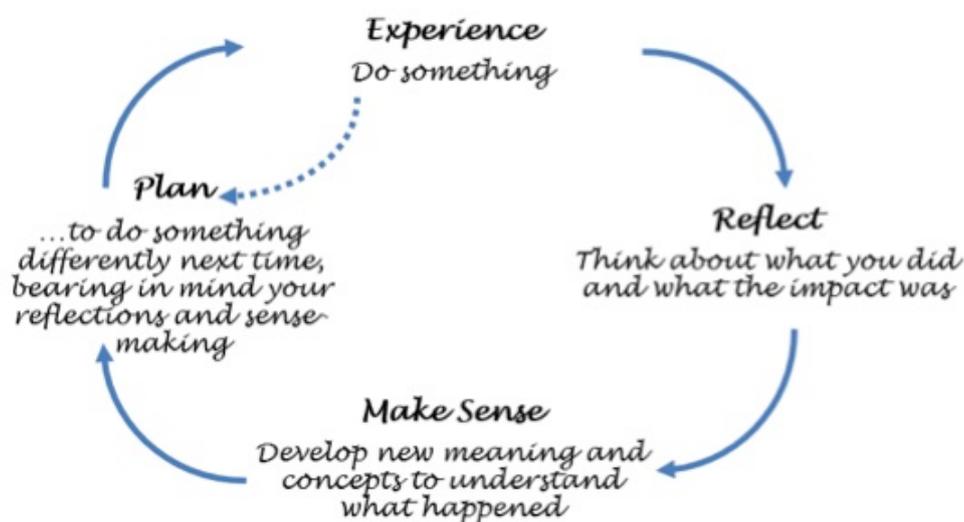


Fig 2: Kolb's experiential learning cycle

The impetus for engaging or developing facilitation skills generally arises after a period of professional experience where the “rubber hits the road” and the theory of organisational life does not match with the practice. We have (with no small sense of satisfaction) had MBA graduates tell us that with us they learnt “*everything I didn't learn on their MBA*” and have seen many trainers come alive with the possibilities offered by whole-person learning (Taylor 2007).

David Kolb (b 1939) is the person most associated with experiential learning theory. He expressed the learning cycle as a continual process of experience, reflection, conceptualisation and application. Kolb et al's model of experiential learning, depicted in Figure 2, guides us in our way of working. We hear from groups that what we offer is often the environment, time, and psychological space to reflect and make sense of experiences in the here-and-now.

We observe how often this cycle is short circuited – or steps are missed out - in our workplaces and beyond. Organisations often lurch from experiences (“Just Do Something!”) to planning for a different experience (“It

didn't work! Do something new!"), as depicted by the dotted line, without having engaged in a time-efficient fuller version cycle of learning. In our wider systems too, we see quick-fixes, soundbites and knee-jerk reactions to things not going as we would want.

Working in a group experientially enables us to learn not only from our own experience but also that of others, plus from all of the interrelated dynamics and patterns that occur in a diverse group, and to our reactions to them. It is truly lifelong learning and this dawning of awareness is daunting and expanding.

*I particularly valued being allowed to take time experimenting with styles, allowing me to build an understanding of how they worked for me and other people... Being allowed and encouraged to discuss this and reflect on these differences and how they can be used to our advantage was a huge eye opener for me...*

## Resistance

It is familiar for us to encounter resistance to a way of working that includes reflection and integration. In our experience, the avoidance of reflective and integrative practices steers us away from an explicit exploration of our situational context, power structures and our own personal authority.

Most frequently in organisations we hear about the rapid pace of work, the pressure not to make mistakes and the high workload.

*"I don't think that I spend enough time focussing on myself and how I want to be perceived, and how I can add more value to some of the work that I undertake. I have a large geographical area and seem to spend most of my time driving around the country, having meetings, putting fires out and then catching up on admin and emails on evenings and planning for the week ahead on the weekend. The workload is exceptionally high and unsustainably so at the moment..."*

It seems to us that 'mistakes' continue to be made despite or even because of this pressure, or more accurately in our frame, experience doesn't necessarily lead to learning through reflection. Objections to the reflective phase usually reference pace, time and "the real world" and these defences usually overlay deeper defences to personal development work. Potential traps exist in getting stuck in reflection ("naval gazing"), sense-making ("analysis paralysis"), planning ("control freaks") or in continual action ("experience junkies").

Another blocker to healthy learning that we find is the shadow side of positive-thinking approaches (perhaps including aspects of humanistic psychology), which prevents uncomfortable material being brought into the light. We refer to this as the "tyranny of the positive". We find that any good-intentioned approach which is badly implemented can generate more rule-bound repression rather than freedom, development and creativity. We view this shadow side as an essential consideration, and we take care to 'delve' into shadow material no more than is required by the group contract or task we are engaged in.

On reflection (!) though - and working through resistance however it arises - we hear how valuable the full cycle of experiential learning in a peer group is to:

- Tell the truth
- Build connection

- Receive feedback
- Share best practice
- Update one's self perception
- Become a critically reflective practitioner
- Understand and take responsibility for one's own situation
- Approach learning in a holistic manner including body, feelings and energy
- Examine deeper thoughts and feelings that we have about ourselves and others
- Remove the mask (e.g. of serious, competent activity) and connect with one's lightness
- Meaningfully sort through and evaluate the complexity of culture, history, goals, abilities, blind spots, shadow material, defences and compulsions
- Experience the Paradox of Change as expressed by Beisser (1972):

*“change occurs when one becomes what he is, not when he tries to become what he is not.”*

## Attending to Group Dynamics

Wilfred Bion's research (1961) suggested that beneath all organisational processes there lies the realm of Group Process (= group dynamics = relationships). Bion described high performing teams ('Sophisticated Work Groups') as working with what is above and below the surface, i.e. explicitly including elements of the human process. He found that lower performing teams ('Basic Assumption Groups') would only work at the level of the task, i.e. above the surface. There is much left unsaid in Basic Assumption Groups and activities are diverted by powerful and common emotional drives (anxiety, fear, guilt, dependence and so on).

This 'fact of life' is the well-known idea that we can live and work superficially (on the surface) and/or at depth. At AoF, as you may have gathered, we attach great importance to what lies beneath the surface of groups and we consider working at depth and with awareness to be key facilitator competencies (see details of [our competency model, FACETS®](#)).

We often sketch out the levels of experiences in groups in a flipchart picture which we refer to as 'The Iceberg model' (see Figure 3), where sea-level is around the middle of the iceberg. We mostly find that there is pressure on organisational groups to work at the surface, generating visible results and taking action. It is rare for an organisational group to prioritise relationships over task, unless (or until) they hit "crisis mode".



Fig 3: Levels of experiences in groups: the iceberg model

The contract we develop with most groups is to work at depth to support and underpin any surface “task” rather than committing to any end point or goal. As with the reflective practice earlier, we encounter resistance and hit defences at individual, group and systemic level which we facilitate groups “through”.

### **Depth work: the power that lies below the surface**

One of the joys as well as the *raison d'être* of our work is helping groups to achieve their shared aims through acknowledging the power of what lies “below the surface”.

#### **Case study 1:**

*A Board of Trustees for a professional association was stuck with formulating their strategy. The President gave me free rein for the agenda and we agreed to “work at depth”. After various scene setting activities in the morning to get to know them, “tune in”, identify issues and build trust/safety (constellations, agenda formation, contracting, truth telling, dialogue) the group, who don't meet often, was connecting well and enjoying doing so. After lunch we hit a brick wall as we approached the topic of articulating the strategy. The pressure of time was starting to build and our room felt cramped and airless. I invited them to take a short walk in pairs around the block rather than push harder at the task. My embodied sense while they were out of the room was that the activity had become stuck as it was “out there” rather than “in here”. On their return, when the room instantly felt bigger and less cramped. We sat close together, and I invited the Board Members to answer a very simple question in a structured and repetitive way: “Why am I here?” Out of that activity emerged three key themes: Support, Sharing, Learning. The atmosphere was electric as the group realised that their own personal themes and shared reasons for being there were also their strategic offering to their membership.*

In practice, as well as being a joy to work with and to witness as it comes together, depth-work can be uncomfortable and slow. What is highly challenging within one group may not be to another and groups need us to meet them where they are and stay alongside them as things emerge.

#### **Case Study 2**

*In working with the leadership team from a domestic abuse charity, we ended up with many post-its on the floor during a planning exercise. As the exercise slowed down, they seemed to want to push on and tidy up and the vibe was “antsy”. I enquired how it would be to leave the messiness on the floor and experienced a great blast of reactions as they all told me about their “OCD-like” tendencies to tidy-up around the office. This led to an in-depth discussion of how painful and out-of-control it could feel to work in the complex and messy arena of domestic abuse.*

### **Defences, Feedback and “A Bit Like Therapy”**

Often, in this group environment, our defences, far from being impossible to overcome (as we fear) are blown away as we learn about ourselves and our impact on others. In practice, we often build this capability with teams through encouraging skills in both giving and receiving feedback. Whether historic or situational, our defences never really work as well as we think they do. We guide participants to pick up accurately on cues

(internal and external) and to become aware of the lenses they use to navigate the world and how, for each of us, our personal 'story' influences how we 'read' others.

As facilitators, working with groups as defences and projections arise, we aim to work in an encouraging way, supporting the person while confronting personal, group or organisational myths. Our work at its best reflects our dedication to core Person-Centred principles (Rogers 1957) and to effective Organisational Development for 'real people'.

Bobbing up to the surface after working at depth, a participant may let out a breath and say "Phew! That was a bit like therapy!". Certainly our approach does share a basis with therapies, particularly humanistic ones, and with any modality which develops greater health and wellbeing. Typically, the people we work with are articulate, high performers and to begin with at least are more comfortable discussing performance than "personal development".

I feel that we do get tired and overwhelmed and as a result it impacts on our results, (that is definitely the case for me personally). We are not as productive as we could be at times because we get too bogged down in things. I think as a group and individually we probably need to work smarter rather than harder. We often duplicate tasks around the building because we are not communicating properly with each other, I think the change in format of our Inter departmental monthly meetings should start to improve this situation though. I think because we are generally under stress/pressure we do not support each other properly and probably miss out on opportunities to make our work lives a bit easier as a result.

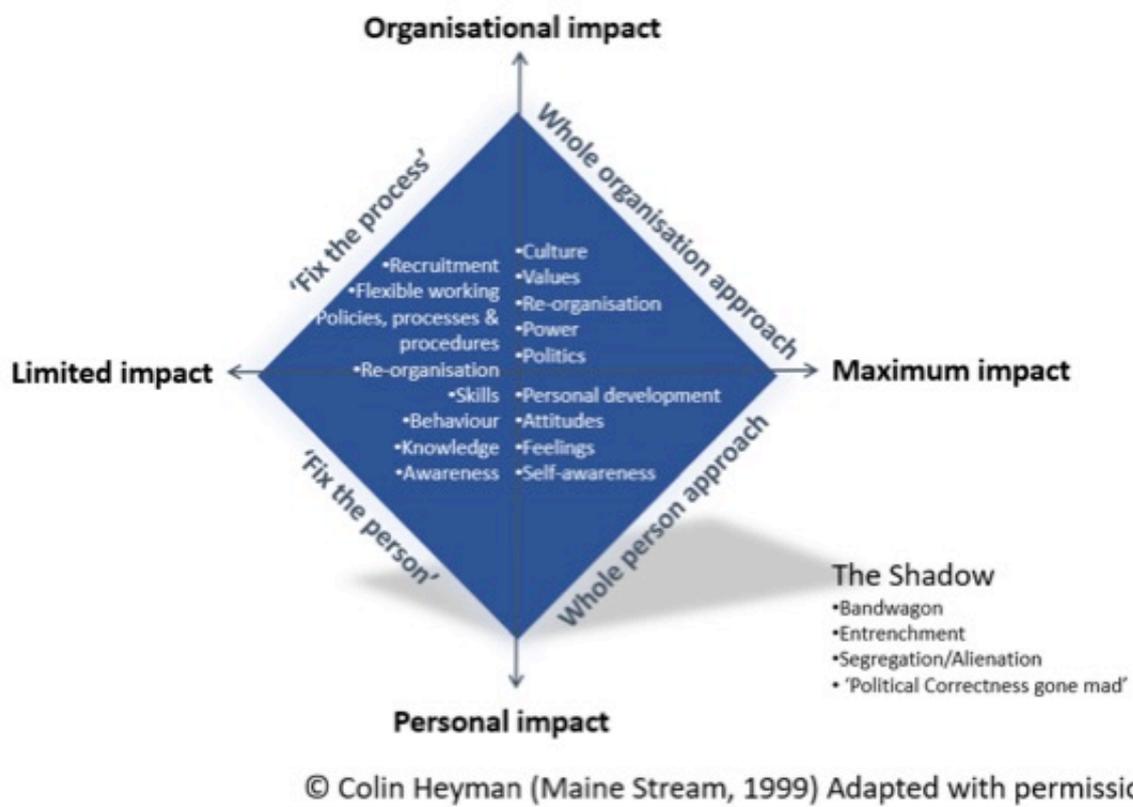


Fig 4: Linking whole person and whole organisation approaches for transformational impact

Our work with teams, while not therapy, is therapeutic, restorative and healing. We introduce to some for the first time the concept of the Wounded Healer (Jung 1951) and many go on to deeper personal work, with us or others.

Our analysis and synthesis of many models and maps provide pathways to link the whole person approach with a whole organisation approach and consider how only both together have transformational impact (see Figure 4, above).

In closing I return briefly to the autoethnographic theme. A major driver for me personally is to offer support to enhance well-being in families. I have previously co-written [a book for female-led businesses](#) (Martin & Mehta 2006) and I play a role in a Community Interest Company dedicated to childcare. Given my background, experience and interests I am occasionally asked why I don't work with families. My answer, quite definitely, is that I do! All of the people within organisations are also family members, in whatever form that takes. A member of a financial leadership team I worked with said that he had slept better as a result of improved teamwork and clarity about his role and performance. When he added simply, almost as an afterthought, that he had been nicer to his wife and children as a consequence, I was not alone in welling up with tears.

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## About Bella

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