

# **MODULE 2**

## **The Role of the Facilitator**



## MODULE 2: THE ROLE OF THE FACILITATOR

The role of the facilitator is an important new role for managers. It is a role that is distinct from those of leader and manager and not merely a subset of leadership and management skills.

### Learning Goals

This module's first learning goal is to understand the facilitator as a distinct role, how to choose the best role for a given situation, and how to make the transition from one role to another. The second learning goal is to identify the key elements of a facilitation model.



### MODULE 2 OBJECTIVES

- Identify the differences between the leader, manager, and facilitator roles
- Learn to choose the best role for a given situation
- Identify tips for moving between the roles
- Identify the elements of the Facilitation Model



2-1

### Learning Objectives

- After a large group exercise and discussion, you will identify the differences between the roles and responsibilities of leader, manager, and facilitator.
- Given practical guidelines, you will learn what is the best role for a given situation.
- Through participative discussion, you will identify tips for moving smoothly between roles.
- After a brief lecture, you will identify the elements of the Facilitation Model.

## THE LEADER, MANAGER, AND FACILITATOR ROLES

Whether in the public sector or private industry, today's workplace is a place of constant change. For organizations to be successful, employees must be flexible and resilient. This is especially true for those who are in management positions. Today, most managers must master the roles of leader, manager, and facilitator in order to get the work accomplished. The work pace is faster and more complex. Managers have greater responsibilities and must deal with vast amounts of information typically with fewer resources than ever before. It is important, however, to distinguish between the three roles so that you will know when to use the appropriate role. The slide below compares the roles of leader, manager, and facilitator.



### COMPARING THE THREE ROLES

<b>LEADER</b>	<b>MANAGER</b>	<b>FACILITATOR</b>
<ul style="list-style-type: none"> <li>• Does the right thing</li> <li>• Sets the vision; future oriented</li> <li>• Focuses on what and why</li> <li>• Inspires innovation</li> </ul>	<ul style="list-style-type: none"> <li>• Does things right</li> <li>• Sets the plan and pace; present oriented</li> <li>• Focuses on how</li> <li>• Inspires stability</li> </ul>	<ul style="list-style-type: none"> <li>• Helps people do things</li> <li>• Helps people create shared vision, work together to achieve it</li> <li>• Helps people think clearly and communicate their thoughts</li> <li>• Helps people respond to change and identify best of "old ways"</li> </ul>

Adapted from "Managers as Facilitators," by Richard Weaver and John Farrell
2-2

Probably the greatest challenges for those using all three roles are integrating them as they often conflict, understanding what is the best role to assume for a given situation, and then moving smoothly from one role to the next. The information contained in the slide above can help you decide which role would be most appropriate for the task at hand.

## DEFINITION OF FACILITATION



### DEFINITION OF FACILITATION

A process through which a person helps others complete their work and improve the way they work together

2-3

## THE FACILITATOR AS A DISTINCT ROLE



### CHOOSING THE BEST ROLE

Factors to consider:

- Nature of the task
- Degree of support needed
- Experience of group

2-4

This slide identifies additional factors to consider when choosing the best role for a given situation. These are the nature of the task for which you are responsible, the degree of support that you will need from others, and the experience level or stage of the group's development.

Nature of Task. The leader role is best if the task is creating the vision or setting the direction. The manager role is the best choice if the task is to set project milestones or deadlines. The facilitator role is best if the task is complex and requires that many people work together to complete it.

Degree of Support. If you must build wide support across the organization, the leader role might be more useful. If you need quick compliance, using the authority of the manager role is the best choice. With workdays filled with lots of decisions, sometimes people appreciate the direction you can give. However, if a deeper level or degree of support and commitment is needed, then the facilitator role is the best choice.

Experience Level of Group. Past observation tells us that the less experienced a group, the greater the need for direction and control. The more developed a group, then the less need for direction. These groups respond well to the facilitator role.

## THE FACILITATOR AS A DISTINCT ROLE, CONTINUED



### TIPS FOR MOVING BETWEEN ROLES

- Announce the shift in role and explain why
- Don't change roles too often
- Remember in the leader and manager role you are not a neutral observer
- Don't abandon the facilitator role too quickly when you encounter a problem
- As facilitator, don't participate in content of group discussion

2-5

Often it can be difficult to move between the roles. The tips given in the above slide can help you make a smoother transition.

It is recommended that you announce your intention to change roles. By explaining to the group why the role is the best one for the situation, you will help them understand what is going on and be clear on your role at any given time.

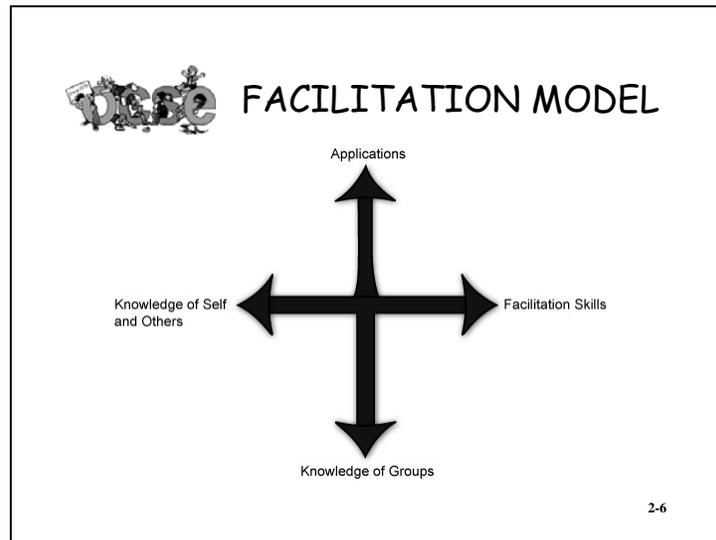
It is important, however, not to change roles too often. Bouncing from role to role can affect the trust level in the group. As mentioned before, if you consider the nature of the task, support needed, and level of the group, these will help you choose the best role. A general rule of thumb is to use one primary role for a given meeting or work session.

Remember that when you use the leader and manager roles you are not a neutral observer. You have a stake in the successful completion of the work and are ultimately responsible for the outcomes. This is in contrast to the facilitator's role of helping the group to be responsible for its own tasks and supporting the outcomes.

Experience shows us that when facilitators encounter problems in their teams, they tend to abandon that role too quickly. They will often revert to the manager role and begin to take control. Many times, the difficulty lies in the failure of the manager in his or her manager role to first clearly set the plan or define limits and expectations for the work. If that is done, then it's easier to stay in the facilitator role.

Perhaps the final tip is the most difficult one to remember. As a facilitator, it can be easy to be drawn into participating in the content of a group's discussion. It is particularly seductive when you are experienced and skilled in the subject at hand. Giving your expert opinion, however well intentioned, is an expert-driven approach and is not part of the facilitator role. If you wish to contribute as a subject matter expert (SME), you need to announce the shift in roles and why. However, when making these choices, it's important to understand your own agenda.

## THE FACILITATION MODEL



The three critical elements at the bottom of the slide serve as the foundation for our Facilitation Model.

Knowledge of Self and Others first involves understanding your behavior and how it can influence the groups you facilitate. The second aspect of this element is knowledge of how people are different and valuing their unique contributions.

Knowledge of Groups involves understanding the process a team goes through in its development into an effective and efficient team and the issues related to each stage of its development. This enables you to guide the team to optimum performance. This element also includes an awareness of team dynamics; that is, how team members participate and interact and the implications for you as a facilitator.

The third element is comprised of the specific skills that an effective facilitator uses to engage people, build their commitment, and achieve the desired outcomes.

Once you have mastered these three elements, you will be able to apply these skills and knowledge to a variety of situations such as facilitating work groups, project teams, and meetings; delivering presentations; and moderating panel discussions.

## MODULE 2 KEY POINTS



### MODULE 2 KEY POINTS

- The facilitator is the most important role to emerge in today's workplace
- Recognizing the distinction between leader, manager, and facilitator is critical
- The nature of the task, level of support needed, and experience level of the group are practical guidelines for choosing the best role

2-7



### MODULE 2 KEY POINTS, continued

- It is not unusual at first to feel uncomfortable in the facilitator role
- Mastering the core elements of the Facilitation Model enables you to apply your knowledge and skills in a variety of settings

2-8

