

Do You Need an Outside Facilitator?

Excerpt from “What to look for in a group facilitator”

Sandy P. Schuman

Filling the facilitation role with the right person can make decision making and problem solving go more smoothly.

While a group member can effectively perform the role of facilitator in many situations, it is often preferable to use a facilitator who is not a group member. This might best be an in-house facilitator who is not associated with the group's work; in some cases it is valuable to hire an independent facilitator. Determining the need for an outside facilitator can be aided by examining the group's condition using the following criteria.

1. Distrust or bias

In situations where distrust or bias is apparent or suspected, groups should make use of an un-biased outsider to facilitate (and perhaps convene) the group.

The individual whose job is to manage the process -- typically the chairperson or team leader -- has an enormous influence on the process and, consequently, the outcome. This person's choice of participants, analytical methods, and methods of social interaction influences the group effort at a fundamental level. Because of this, group members might view this leader as biased -- steering the process in some way to promote his or her own agenda. True or not, this perception can greatly hinder the process.

Check the box that best represents your situation:

interpersonal trust					suspicion				
1	2	3	4	5	6	7	8	9	10

2. Intimidation

The presence of an outside facilitator can encourage the participation of individuals who might otherwise feel intimidated.

Where participants are of disparate educational, social or economic status; are at different hierarchical levels; or are in other types of control relationships (such as purchaser-supplier or client-provider) some group members might feel intimidated and not participate. The presence of a facilitator can give participants someone of neutral status to whom they can direct their comments without fear. The facilitator is in a legitimate position to elicit information from the group as a whole, as well as from specific individuals who are not forthcoming. In particularly tense circumstances, the facilitator might choose to elicit information anonymously.

Check the box that best represents your situation:

low status differential					high status differential				
1	2	3	4	5	6	7	8	9	10

3. Rivalry

Rivalries between individuals and organizations can be mitigated by the presence of an outside facilitator.

Participants are typically reluctant to reveal personal rivalries or attack one another in the presence of an outsider. (Perhaps they realize that their claims might not appear valid to an outsider, and so do not even raise them. Participants are often surprised at how polite they are to each other.) But, if rivalries do surface, a facilitator can determine if they are relevant to the task at hand. If they are not, the facilitator will refocus the group on its stated purpose. If they are relevant, the facilitator will ask the group to understand them as part of the the issues to be addressed.

Check the box that best represents your situation:

low competition					high competition				
1	2	3	4	5	6	7	8	9	10

4. Problem definition

If the problem is poorly defined, or defined differently by multiple parties, an unbiased listener and analyst can help to construct an integrated, shared understanding of the problem.

When a group represents disparate views, members are often more concerned with having their point of view understood by others, than understanding others' views. An unbiased party, one who does not advocate any particular position and whose role is to listen to, analyze, and integrate everyone's views, is a valuable asset to such a group.

Check the box that best represents your situation:

well defined, held in common					poorly or differently defined				
1	2	3	4	5	6	7	8	9	10

5. Human limits

Bringing in a facilitator to lead the group process lets members focus on the problem at hand, which can lead to better results.

In difficult situations, working with the breadth of issues and volumes of important information is demanding enough; it is too much to expect anyone to also manage the processes that come into play in a meeting. Human cognitive capabilities are not great enough. Running a meeting, and participating in a meeting, are each sufficiently demanding to warrant having the facilitator focus on the former, and the group on the latter.

Check the box that best represents your situation:

low demands					high demands				
1	2	3	4	5	6	7	8	9	10

6. Complexity or novelty

In a complex or novel situation, a process expert can help the group do a better job of working together intellectually to solve the problem.

Process expertise requires judgment, practical skills, and in-depth knowledge of problem solving and decision making. According to David Korten, "The capacity to manage social learning is itself a form of social knowledge." Most groups have developed their own expertise for addressing ordinary problems or making repeat decisions. When approaching an unusual situation, however, a group can benefit from an expert for whom this particular problem-solving situation is familiar.

Check the box that best represents your situation:

simple or familiar situation					complex or unfamiliar situation				
1	2	3	4	5	6	7	8	9	10

7. Timeliness

If a timely decision is required, as in a crisis situation, the use of a facilitator can speed the group's work.

If participants have to make process decisions as a group, they take valuable time away from addressing substantive issues. Unlike parliamentary procedure, for which there are prescribed rules which address nearly every procedural issue that a decision-making group can encounter, there is no rule book for collaboration. Instead of making up the rules as they go along, groups can adopt the rules of a process expert. The expert acts as a group process parliamentarian -- choosing which rules to apply, explaining them as needed, and steering the group through the process.

Check the box that best represents your situation:

no rush					pressure to solve quickly				
1	2	3	4	5	6	7	8	9	10

8. Cost

A facilitator can help the group reduce the cost of meeting -- a significant barrier to collaboration.

Participants might be reluctant to attend meetings because of competing demands on their time, doubts about the amount of progress they will be able to make, or travel costs. By making each meeting more efficient and productive, a facilitator can reduce the overall cost in terms of participants' time. Because more is accomplished at each meeting, the total number of meetings might be reduced.

Check the box that best represents your situation:

easy to get together					difficult to get together				
1	2	3	4	5	6	7	8	9	10

A higher score suggests that

- the role of facilitator should be clearly differentiated from that of a participant and
- an outside, **unbiased** facilitator should be used.

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