

Group Process Facilitation

Three Case Examples

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Case Example #1

Annual Board Planning Retreat

Typical with many volunteer community organizations, a successful year is dependent upon high commitment and involvement from Board members and officers toward the realization of a collaboratively developed Business Plan. The challenge was to efficiently create a Board retreat for a Chamber of Commerce that would simultaneously produce a collaborative Business Plan, be energizing, and fun, but respectful of the busy schedules of the members of the board.

Services Provided

Consultant interviewed the Chair, Chair-Elect, and President to gain a historical perspective of the organization, the current challenges (internally and externally), priorities for up-coming year, and the history of past board retreats. From that data, a 1 2 day retreat was designed for the 25 anticipated participants. The retreat began with an ice-breaker activity followed by use of a personality-style instrument (designed to breakdown barriers and illuminate opportunities for synergy). The Business Plan process was facilitated through the coordinated use of small breakout groups combined with large group report out and consensus building. The members revisited the Vision of the organization, reviewed current year Prouds & Sorrys, established goals for up-coming year, developed strategies for realizing the goals, and concluded by anticipating the roadblocks to accomplishing their goals and possible means to address these potential roadblocks.

The process concluded with a unique closing energizer that would be used by the Chairman of the Board and the President as a symbol and reminder of their collaborative agreement and commitment.

Outcome

A viable and realistic Business Plan was developed. Board members and executive staff deepened their working relationships such that they would be ready to respond, in a creative way, to opportunities that would inevitably occur during the year. In the words of the President: *"The retreat provided the momentum and the courage to execute a workable Business Plan and to make necessary adjustments based on opportunities."*

Case Example #2

Community Board Development

A group of dedicated, community leaders had been asked by local government to assist in the redevelopment / revitalization of a disadvantaged neighborhood. Most all members of the Board were African-American residents of the neighborhood. They were deeply vested in improvement of their community, but also had a long history with each other and with local government officials. Prior to awarding a contract for community development, local government wanted to ensure that the Board was solid and operational. The assignment was to design a process that would facilitate board member=s willingness to make an honest assessment of their own functioning and then initiate self-improvement actions. The challenge was to accomplish this assignment in a spirit of collaboration with board members - without alienating them or assuming leadership responsibilities that rightfully belonged to the board.

Services Provided

The first step was to establish a respectful relationship with board members in which everyone could openly state their apprehensions and Agendas.” Then, through a series of interviews and small focus groups, the internal dynamics and functioning of the board was identified. A twelve point Board Assessment report was developed and presented to all Board members during a Board retreat. The results and implications were discussed and, ultimately, the board members reached consensus on a course of action that would address deficiencies and revitalize the board. Consultants agreed to withhold submitting their report to local government until the Board prepared their response to the report.

Outcome

The Board submitted a comprehensive response and self-development plan to local government which demonstrated the commitment and dedication of the Board. Board leaders and members gained a greater understanding of the dynamics and growth challenges facing their Board. Both local government officials and Board members reported satisfaction with the process. The relationship between the two groups was improved which set the stage for a more united community development effort.

Case Example #3

Stakeholder Dialogue/Planning

A local community organization was interested in establishing a new program for the treatment of juvenile offenders. The success of the program would largely depend upon the strength of the commitment to the new program by several agencies and organizations and the inter-cooperation among those agencies with the program. The host organization needed a process that would draw from all invitees their best thinking about the design of the program as well as the establishment of an atmosphere where inevitable obstacles could be identified and addressed during the design stage. Additionally, the host organization wanted to vest each participant in the continued success of the program such that each person would become a community advocate for the program.

Services Provided

A facilitated process was designed whereby representatives from eight different community agencies would collaborate with the members of the host community organization in the initial design of the juvenile treatment program. This facilitated process involved two, 2 day stakeholder meetings during which all aspects of the program were discussed. Ideas and suggestions for innovations and cost-saving and cost-sharing were solicited. Through the process each agency representative gained an appreciation for the *Abig picture@* - the *systemic implications* of a comprehensive juvenile treatment program. All data from the discussions were collected and organized by the consultant for delivery to the host organization. Policy documentation was then developed, by the host organization, from this data. A third and final facilitated meeting was conducted prior to the opening of the facility. Program policies and procedures were explained, feedback solicited, and final modifications in design accomplished.

Outcome

The host organization reported that the quality of program they set out to design was significantly improved through the stakeholder dialogue. With all the *players* around the table, blind spots, roadblocks, and inadvertent turf trespassing was significantly reduced. Just as importantly, the process produced critically important community proponents for the program. These activities strengthen the operational viability of the program.

Dr. Burt Bertram – Facilitator, consultant, trainer, coach and counselor, Burt Bertram has been in practice in the Orlando, Florida area since 1972, Burt is most professionally satisfied when he is helping individuals, groups, and organizations resolve sensitive, complex and important “people-related” issues. Burt Bertram received a Doctorate in Counseling from the University of Florida.

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