



Learning for Leadership

A Facilitative Approach for Training Leaders



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Chapter 2

What Makes a Classroom Facilitative?

This chapter will cover:

- building a facilitative learning environment
 - classroom techniques and teaching styles
 - managing participant resistance
 - using your leadership to enable trainees' leadership.
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THE VALUE OF THE RIGHT ENVIRONMENT

In the previous chapter we saw that adults very effectively learn leadership through the interactive, participant-driven, professionally relevant and cooperative approach known as facilitation. Our next task is to figure out how to build such a learning environment. Of course, proper theory and pointed techniques are absolutely necessary. But they're not enough. What really makes a classroom facilitative is the facilitator's and participants' reliable emotional presence in a relationship of trust.

Significantly, it's this same virtue of trustworthiness that makes genuine leadership—not just authority—possible. Facilitative leadership education instills in trainees the habits of listening, collaboration, speaking one's truth, and keeping one's principles by actually practicing and polishing these difficult, but essential, leadership qualities. Understanding the facilitative aims and techniques will let you strengthen exactly those traits in your leadership candidates.

VARIETIES AND ESSENCE OF FACILITATION: ACTIVE AND INTERACTIVE LEARNING

In chapter 1 you read that facilitation is the “lecture-replacement” teaching method that empowers participants by centering the learning environment around their experience and motivations. You also noted the spectrum of perspectives within the facilitative approach: One practitioner might hold that classrooms should be entirely democratic, while another directs fledgling groups; certain facilitators focus on group process, while others emphasize course content.

But despite these variances, all facilitators expect participants to apply their prior knowledge as they process new material together. That is, they agree that facilitative education means both active learning by participants as individuals, and interactive learning in groups, as well as interaction between them and the instructor. Especially as a leadership developer, you'll appreciate that energy and esprit de corps are fundamental executive qualities.

SPACE, TIME, AND TEACHING STYLES ENCOURAGE INTERACTIVE LEARNING

To help you strengthen those characteristics in your learners, we'll turn to basic methods that invite truly interactive learning.

Setting the Stage for Interactive Learning

To attain the active learning that facilitation demands, instructors need to create and maintain the most interactive environment possible. Current research tells us that compartmentalized, hierarchical, and rigid course structures actually discourage education. Child and Heavens (2003) reminded us that learning abilities are not only determined individually, but socially, since most teaching is offered by institutions; further, they found that institutions that very strictly separate fields or specializations within departments can hinder learning.

Conversely, then, facilitators can and should employ spatial, temporal, and stylistic arrangements that favor interactive learning. They can:

- Organize classroom space to remove physical barriers between themselves and participants, and among participants (such as podium-and-pews or assigned seats).
- Explicitly divvy up equal class time for each member's comments and for group and subgroup discussions.
- Present essential information verbally, visually, and experientially.

Good facilitators shape the teaching environment itself not just to permit, but to pursue, the creative interplay of persons, opinions, and learning preferences.

Having set the physical stage for learner-driven education even before the first session (for details, see Part III, chapter 7), facilitators can direct less during class and allow learners to mold the material to their interests, trusting them to negotiate classroom decisions. So right away facilitators encourage discussion, role-playing, group research, and presentations—tasks Indiana University physics professor Richard Hake (1998) recognizes as “designed . . . to promote conceptual understanding through interactive engagement of students in heads-on (always) and hands-on (usually) activities which yield immediate feedback through discussion with peers and/or instructors.” Quick, constant confirming or correcting benefits your trainees doubly: It models how to balance leadership qualities of openness and decisiveness, because you are listening and

responding to them as individuals and, at the same time, you are focusing on the course agenda.

Facilitators expect that they and class members will jointly set course objectives and assessment criteria and strive for equal participation from all learners, however differently abled. To fulfill these intentions, Anderson (2007), Record (2004), and many others caution that instructors must offer what educators call differentiated instruction—built-in options in what material course takers will learn, how they will learn, and how their learning will be evaluated.

Why Leadership Facilitators Use Differentiated Instruction

The justification for using differentiated instruction in teaching both children and adults draws upon the insight of the early-twentieth-century Russian psychologist Lev Vygotsky, who said that individuals learn best when the information taught is appropriate to their ability to function in society. According to educational psychologist Kathie Nunley (2006), differentiated instruction has become an essential part of all American educators' repertoire over the past 40 years as the cultural make-up of American classrooms has become increasingly heterogeneous.

While most “constructivist” (social preparedness) learning theorists focus on children, we saw that facilitation accepts and welcomes different learning styles among adults and holds that, for mature persons as well, course content and delivery should match their intellectual and social readiness to grasp it. Contemporary instructors enrich this social preparedness view through cutting-edge research into the neuropsychological development of the brain and personality (Anderson 2007). And we already know that facilitative theory accepts and encourages the life-long evolution and expansion of adults' learning modes. In fact, facilitative leadership development in particular expects transformative evolution of trainees and trainer alike by requiring openness to new

ideas, polishing skill in mirroring others' expressions, and integrating widely different viewpoints and talents into collectively envisioned and achieved goals.

How Facilitators Use Differentiated Instruction

Differentiated instruction directs the educator to deploy a variety of teaching methods to suit students' varied learning profiles. For example, they may blend whole-class, group, and individual instruction; use varied verbal, non-verbal, auditory, visual, and kinesthetic (moving) approaches to convey core information; and apply differing modes of artistic, performance, individual, and collective evaluation. As Tomlinson and Allan (2000) put it, the learner-centered model asks instructors to tailor instruction to learners, rather than requiring learners to bend themselves to the curriculum. Participants' social, intellectual, and emotional maturity, interests, and abilities directly shape course content, presentation, and testing.

Equally important, the transformation of trainees' interactive and reflective qualities through facilitative education encourages teachers and participants to constantly reshape course curriculum, approach, and evaluation. (For plenty of ideas on how to deliver differentiated instruction in your leadership course, see Part III, chapter 6 and chapter 7.) With practice, you'll come to offer multiple slants on what you're conveying without absorbing too much class time.

Case in Point: Differentiation, Not Self-Immolation

In one class, I tried six ways to Sunday to tailor my instruction to reach a few participants with poor educational backgrounds. But rather than being respected as creative and inclusive, I was resented as disorganized and dumbing-down. I learned that “differentiated education” means varying my style and offering alternative assignments, but not doing gymnastics for a few on class time.

Facilitator Skills

Because the success of facilitation hinges on active participation, it demands different skills than lecturing. As noted earlier, facilitators fulfill the same tasks as do conventional instructors, but they must accomplish them by motivating class member contributions:

- They introduce new material, but do so by steering class members to information sources rather than giving them “the answer.”
- They assess learning, but negotiate grading criteria with participants.
- They clarify the course purpose, but survey learners’ interests to set agendas and formats collectively.
- They field questions, but reroute authority to the group as researchers rather than as passive note-takers.

So while the instructor proposes ideas and moves the course along, at every step he or she needs participants’ input and consent.

Enabling trainees to attain their agreed-upon aims means that often, instructors must spark discussion, summarize information and reactions, and mediate disputes. Hootstein (2002) defines the facilitator as an informed expert and resource provider, director of agenda, creator of collaborative environments, and model of proficiency. Berge (1995) and Liu (2005) view the facilitator’s roles as pedagogical (creating a learning environment and contributing specialized

knowledge), managerial (organizational, procedural, and administrative), and technical (acclimating students to the system). Additional functions include setting the pace and assessing performance, as well as establishing the intellectual and social environment for learning. In brief, surveying the major writers on the topic tells us that the facilitator works as a consultant, gadfly, cheering section, and referee as needed to widen participation, refocus discussion, rein in the talkative, and curtail emotional outbursts.

Fundamental to all these roles, and to your central aim of eliciting general participation, is the ability to mirror—accurately summarize and express—participants’ comments. Without your concise re-presentation of possibly unclear statements, participants who cannot make themselves understood (or who do not feel understood) tend either to repeat themselves with escalating volume or withdraw. Providing a verbal synopsis of remarks, relating one member’s ideas to another’s, inviting expansion or completion of a cut-off sentence—these are some of the most effective ways facilitators can keep participation both universal and productive.

Case in Point: Say It Back

One class member’s presentation went poorly, and furrowed brows and exasperated looks showed that no one understood what he had meant to say. In frustration, he lashed out furiously at a classmate for giving him “bad advice” on his project, nearly reducing her to tears. I had to weigh how much of the incident I should process without turning the class into a group therapy session. I elected to state in front of the class, briefly, that the presenter did not feel he had expressed himself well, and blamed a classmate. I then walked over to the targeted person and asked her if she was alright. At that point the offending participant stood up and apologized both to the class and the targeted classmate.

In other words, skilled facilitators must grasp and respectfully acknowledge group members' feelings as well as ideas. For interactive learning to occur—or even to be tolerated—strong emotions arising from disputes or airing deeply held beliefs must be recognized and directed positively, or class communication may be permanently damaged. Facilitators must have problem-solving options at the ready to overcome any impasse: reframing the issue, dividing participants into small brainstorming groups, calling for a short break, or noting where disputants actually agree. Another way they recognize members' concerns is taking advantage of “teachable moments”—unplanned opportunities that arise spontaneously in class but provide the perfect instance for presenting important information or ideas. Great facilitators rejoice in these fleeting opportunities because they reveal students' genuine interests, and often let them blossom into a full-blown lesson.

Case in Point: Correction Delayed is Correction Denied

Despite a collective outlawing of side conversations, texting, and phoning, these behaviors became rampant in one of my classes. Repeatedly throughout the course, I asked trainees to review our code of conduct, but to little avail. On the last night of class, a crucial group presentation was interrupted continually by a couple of class members texting and chatting. I pointed out that the presenters were permitting the very actions they had prohibited at the beginning. To my surprise, instead of appreciating and applying my intervention, the group—including the presenters!—became upset with my “changing the rules on them.”

I was forewarned and ready the next time. In another class, a perennial late-comer loudly announced his entry, let his phone jangle, answered it at the top of his voice, and announced to titters that “it was just a telemarketer.” Worse, no one complained. I was disappointed in the collective passivity about breaking group rules. But I knew to channel

my feelings into a leadership lesson rather than indulge them in admonishment or regulations.

I began the next session with a new icebreaker. Dividing the class into four groups, I asked each to list the work behaviors they most valued. From this list, each group would compose guidelines for professional conduct, write them on the board, and justify them to the class. The resulting four guidelines were stunningly identical, specifying tardiness, rudeness, and divided focus as inadmissible. Only then did I let myself point out that they were regularly tolerating violations of precisely these basic expectations in class. Then, the whole group formally wrote up the regulations they agreed to maintain throughout the program. At the close of that session I explained that I had not exerted my authority to end the chaos earlier, preferring the deeper experiential learning they would take outside the classroom.

After this, all side conversations, phone use, and tardiness stopped cold. On the course evaluation one respondent noted that the experience “exemplified what leadership is, tied this whole program together, and brought leadership into our being. It made visible the need for leaders to look inward so we can demonstrate that to others. The dynamics of the class took an obvious turn for the better . . . As [President] Lincoln states: ‘If you are a good leader, when your work is done, your aim fulfilled, your people will say, ‘We did this ourselves.’”

But while they may need to smooth group workings, facilitators remain neutral about the actual outcome of discussions and let the team lead. Boyd and Myers (1988), and King (2005), direct educators to practice, first, seasoned guidance—the ability to serve as an experienced mentor who can help others transform themselves—and, second, compassionate criticism that helps students question and work out their own world view.

It follows that there are specific behaviors instructors should avoid:

- praising, or criticizing, ideas of individual participants
- pushing their own ideas

- making new class rules without consulting participants
- making lengthy comments.

The National Guidelines for Educating EMS Instructors tell us that to help your participants operate as independent active learners, you need, above all, to understand group members as people. In addition, you must demonstrate planning, communication, growth, problem identification, and problem-solving behaviors—in short, the same behaviors you hope to strengthen in trainees.

When you ask people to think back on those who inspired them most, they very often name a teacher (and often, an early one). But they almost never ascribe the impact to that teacher’s subject matter. They rarely cite geometry or Spanish as a guiding force in their lives. What they’ll tell you is that the teacher “believed in me when nobody else did,” “taught me to try again after messing up,” “pushed me to develop my gift,” or “worked me hard but was always there to help.”

Although we don’t usually consider schoolteachers as executives, it’s clear that those who value individual students enough to demand their very best do, in fact, function brilliantly as genuine leaders. And as a leadership developer, you get the chance to inspire your trainees in exactly the same way. You do not teach leadership as a subject matter, but by modeling leader-like qualities and expecting them in your trainees: appreciation of others, encouragement of individual talents, holding to standards, and personal trustworthiness.

THE BIG PROBLEM: PARTICIPANT RESISTANCE TO ACTIVE LEARNING

Unfortunately, your virtues alone won’t suffice in facilitative instruction, where participants bear at least as much responsibility for their learning as the teacher. That they don’t always accept this duty is graphically illustrated by a student comment Benvenuto (1999) cites: “Get up to the f---ing board—that’s what we

pay you for!” One reason for such reactions is that, for many, active learning in a group is hard, even painful. Facilitation questions the long-standing perception that “good students” are obedient, passive learners, and insists that they become entrepreneurial, strategic learners. This new view implies new rules, namely that learners should:

- try to transcend past attitudes about learning
- question ideas absorbed from other persons or institutions
- view their life experience as making them more, not less, open to change
- consider different beliefs with respect
- use both rational and emotional mental processes
- integrate critical reflection into their class work and personal life.

If class members seem asleep and I think I’m seeing simple boredom, I’ve learned to employ what I hope is humor and what I know is tact to comment on the body language I observe, and suggest the class discuss its meaning. Perhaps shocked by the honesty, listeners generally straighten up and pay attention, air their gripes, listen to their classmates, and reapply themselves to work. I ask particularly resistant group members to meet with me outside class, also usually to good effect. And as every Scoutmaster knows, putting problem kids “in charge” can turn them around by making them invested in the group’s success; most often I get similar results by pointedly inviting disgruntled learners to help plan upcoming units. For truly stubborn cases, I first consult my colleagues for a fresh perspective, but I am ready to drop an enrollee if need be, and I make sure tough customers know it.

THE BIG SECRET: INTERACTIVE LEARNING REQUIRES RELATIONSHIPS

So facilitation won't work just by moving seats around, matching material and delivery to folks' interests and skills, and accurately summarizing their comments. To function, it has to restructure the traditional student-teacher interaction to favor learners' active acquisition of information that may shake older certainties and introduce new notions. Thus, while active learning may be the most effective means of educating adults, it is by no means the easiest. It requires a participant-facilitator relationship of respect and trust to allow the expression of opposing views, newly noticed doubts, and genuine growth.

Case in Point: Support Your Local Bully

I had a bona fide bully in one class who counted on others' following the path of least resistance rather than speaking up. In one incident he insisted on doing a group project he had already done for three other courses. When I reminded him the project had to be a new, cooperative creation, he visibly sulked and actually grew more upset as his group relaxed and listened to previously silent group members.

I wasn't surprised when he came to my office to ask how to drop the class. But I didn't answer his ostensible question. I simply said that this class was presenting him with some very new experiences, but I was confident he could handle them fine. He left without a word. And not only did he stay in the class, in ensuing sessions he became increasingly relieved and interested.

According to Creighton (2005), whenever people work together they are communicating on at least two levels: the level of factual content and the level of their relationship. In the traditional lecture-based classroom, "factual"

communication receives all the attention, while “relationship” communication is only rarely mentioned. Nonetheless, the relationship is constantly conveyed by every single classroom event: who gets to speak and for how long, whose needs take precedence, or who gets cut off or put down. In other words, each detail of how the class is run—its “process”—constantly transmits each participant’s relationship to colleagues and to the instructor.

The learner-centered education model that’s so prevalent in adult education theory actually originated in educational psychology. So it’s not surprising that theorists in this field, such as Cornelius-White (2007), noticed that optimal learning occurs only in the context of an honest and consistent interpersonal connection between learner and instructor. Because facilitation combines the characteristics of experiential, self-directed, transformational, and group approaches, the relationships between facilitator and participants, and among groups and subgroups of participants, form the foundation of all classroom learning.

Modeling Qualities

Clearly, by modeling good teaching, facilitators prepare participants to lead group learning activities themselves. Cranton (2006) makes a subtler point: The good teacher is actually modeling the “good student” who is willing to learn and to change. Taylor (1998) and King (2005) point out that a teacher’s mature quality of critical reflection helps students connect the sometimes conflicting rational and emotional aspects of the facilitative classroom experience. So, the facilitator’s first job is to create a climate of safety and sensitivity. Heifetz, Grashow, and Linsky (2009) specified that such an environment lets participants question their own and others’ preconceptions and try out new solutions together. Especially in programs that seek to develop executive strengths, you as a facilitator need to do exactly what you expect from trainees: try to transcend personal beliefs and understand different ones; cultivate and celebrate alternate

ways of learning; establish trust, encourage caring, and reflect on one's own experience in order to help others.

Borrowing from the work of Heifetz and Linsky (2002), Parks (2005) notes that gifted facilitators demonstrate genuine leadership for their trainees: They stay “on the balcony” rather than direct—or, worse, star in—the show; they “orchestrate the conflict” by using classroom stress to reveal competing values; they “give the work back” to participants; and they always “hold steady” under fire. To ensure completion of the agenda they identify and address counterproductive group dynamics by drawing out the introverted, protecting the targeted, redirecting meanderers, and restraining the aggressive. Similarly they attend to the group process as a whole in order to encourage free and vibrant, but fair and constructive, debate and decision-making.

In fact, your sensitivity to and resolution of subtle frictions in this micro-cosmic society expresses the same leadership traits participants will internalize. Above all, as an able facilitator you'll model the emotional, intellectual, moral, and mental qualities of character crucial to leading—chiefly integrity, initiative, and respect for self and others. Having integrity means conducting oneself according to ethical standards. In the classroom, this means you as the facilitator do what you promise, explain your motives honestly, and treat all participants equally. By initiative, we mean that you as the facilitator can start and support an interactive, constructive, and effective group process. In your facilitative role you show respect for self and others by expecting, and valuing, all group members' efforts, and by acting as a just referee in disputes.

Ethical Duties of Facilitators

It might be reasonably argued that all good instructors possess the virtues of integrity, initiative, and respect for self and others. But because facilitative learning has such power to transform participants' views and stir troubling emotions, it poses particular ethical challenges and so requires especially

careful behavior from the instructors. For example, Boyd and Myers (1998) and King (2005) consider grieving as a necessary and critical phase in transformational learning, as learners must be allowed to mourn the loss of old patterns of thinking before they can adopt new ones. Daloz (1999) concurs that growth can be frightening as learners have to let go of old concepts of self and the world. Comparing transformation to a journey in which the mentor serves as gatekeeper and guide, he reminds instructors to structure their courses to maximize learners' profound personal development rather than their merely technical competence.

Many other emotional hazards in the facilitative classroom demand equal sensitivity: transference and counter-transference (learners' and instructors' unconscious emotional investments in each other); keeping confidentiality within and outside the classroom; managing the shock of cognitive dissonance; and discussions of "hot button" topics too intense for some to handle. And because facilitation aims squarely to transform ideas and behaviors, even your subtlest disapproval can destroy participants' sense of safety and, in turn, their ability to take in and apply new concepts. Starbuck and Hedberg (2003) remind us that positive outcomes are much more likely to result in successful learning than are negative ones. Their research supports the idea that facilitation, like all transformational teaching, rests on trust. Good instructors know that recognizing success helps people learn; great facilitators know that giving participants the "license to fail" without fear of humiliation is key to their personal as well as professional growth.

Given the personal challenges and changes facilitative education invites, Baumgartner (2001) confronts perhaps its deepest moral question: whether instructors even have a right to practice transformational learning. Reminding instructors that transformational learning frequently brings up disturbing emotions for both learners and teachers, she emphasizes the need to build a caring relationship between all parties. She also recommends that the instructor

and learners design a formal code of classroom ethics together, and further encourages instructors to support each other in a learning forum. Thus (although with minimal interference) facilitators must:

- Supervise the writing of a classroom code of ethics.
- Suggest options to help the class or small groups overcome impasses.
- Defuse personal conflicts between students.
- Avoid discussing exceptionally disruptive topics or beliefs.
- Assess and calm strong emotional reactions in learners.
- Keep the discussion tone educational rather than therapeutic.

Case in Point: You're the Leader

I once had a course enrollee who adamantly insisted that we needed to conduct 360-degree feedbacks (universal performance reviews) in class. I had a gut feeling it wasn't appropriate for the group at that stage, so turned down his request without negotiation. I then worried for days that I had been authoritarian. But the more stridently he repeated his demand, the more clearly I could put my finger on the reason for my instinctive veto: I had unconsciously realized that his real motive was a passive-aggressive wish to critique others. From this I learned to honor my own judgment in protecting the psychological safety of the class.

SUMMARY

The ethical foundation of facilitation supports both teaching and learning leadership. If we need further proof that facilitation works because of the trusting relationship built between participants and the instructor, let's consider the special demands it places on the facilitator. Although all interactive approaches fire up participants' feelings, facilitation requires that the instructor moderate group dynamics fairly to let group members freely compose, and then faithfully follow, class rules and agenda. Further, an able facilitator must create a relaxed,

reliable, and psychologically safe ambiance for collaborative problem-solving and for the transformative experiences of the facilitative classroom. Most important, class members learn by observing the instructor manage issues and procedures. That is, your trainees can practice leadership only if they experience your integrity, initiative, and respect for self and others. Then their work in groups and as class leaders increases their appreciation not only of your knowledge, but of your character.

So the fundamental role of trust in facilitation is not just an ideal. It is a fact that effective leadership really means ethical leadership. Heading a business or public organization without respecting others enough to learn from them and to maintain their trust limits leadership as well as loyalty. If you understand this truth, you understand why facilitation is the optimal leadership training approach for both teachers and trainees. In the next chapter, through the lens of group dynamics theory, we'll see exactly how the ethical concerns of facilitative leadership training transform learners into leaders.

REFLECTION AND NEXT STEPS

1. **Consider your comfort.** In what ways does contemplating facilitative teaching make you uneasy? What techniques or aims do you use already that resemble facilitation? How might recalling your own student days—the best and the worst—inspire you to teach in a facilitative, interactive, and cooperative way?
2. **Every classroom presents a mix.** Can you see yourself using differentiated instruction—a variety of presentation styles to suit different participants' strengths—or does this feel like “dummying down” to you? How might you make knowledge accessible to different types of learners?
3. **Find opportunities out of class to practice the art of mirroring.** How does it change your listening when you know you've got to mirror someone else's ideas and feelings back? What's the hardest

part of mirroring for you? What might help you understand and communicate others' messages better?

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