



Facilitated groups: keeping them fit and healthy

If you work with or are a member of a group or groups, then it's likely that you're familiar with at least one that's started off with a bang and subsequently run out of puff. Sometimes the condition has been terminal while at other times action has led to the group being resuscitated and becoming healthy and functioning again. While a contributing factor can be "burnout" amongst the membership, particularly group leaders, there are a number of other potential causes.

Work by the Cooperative Venture for Capacity Building (CVCB) provides some helpful pointers on how to manage groups to ensure that they function effectively and efficiently.

As the result of a 2-year national review of extension and education across Australia, Jeff Coutts, Kate Roberts, and Fionnuala Frost identified characteristics of different extension models (see box) and used these to develop indicators for success.

Extension models

Facilitation. This model focuses on participants increasing their own capacity in planning and decision-making and in seeking their own education and training needs based on their situation. Groups may undertake their own research. The project will often provide or fund a facilitator to assist groups to define their own goals and learning needs and to help them realise these.

Technological development. This model is about individuals working together to develop specific technologies, management practices or decision support systems which will then be available to the rest of the industry or community. It often involves local trials, demonstrations, field days and on-site visits.

Training. This model is about delivering specifically designed training programs and workshops to targeted groups of landholders, community members, government personnel and others to increase understanding or skills in defined areas.

Information. This model is about providing a range of blanket information that individuals and groups can access from a distance and at a time that suits them. It can be based on a website, information centre or other centralised locations.

Consultant. This model recognises the interaction between a mentor or a consultant who works over time with an individual or community to improve their managerial, technological, social or environmental situation - or individuals from different backgrounds working together on a 1:1 basis.

This factsheet looks at the **facilitation model**, typified by landcare, *BestWool2010*, *BeefPlan* and *Women in Dairying* groups. It describes the characteristics of a healthy group in this model and provides a checklist you can use to assess group health and as a way of evaluating the group's performance.

The key underlying philosophy of this model is that participants are best served when they are provided with a facilitative framework where they can define their own problems and opportunities and seek their own avenues to address them. This is about ownership and responsibility – but it is also understanding that it is the people in a specific situation that are best able to understand and act on issues directly concerning them. By encouraging people to work together in this way, more lasting and sustainable solutions are likely to result.

BUILDING SUCCESSFUL GROUPS

A number of principles contribute to the success of groups in this model. While some of these are pretty obvious, the trick is actually putting the principles together and adapting them to specific situations to make them work.

Self formed groups are best. Any facilitator or member of a group knows that if the group isn't really interested in a particular issue or achieving a particular goal or being involved in a particular project, then you have an uphill battle to make progress. A fundamental principle, then, is to allow groups to form around an issue themselves.

Related to this point is the fact that the group needs to be clear about the requirements for ongoing funding (assuming it is funded) and whether it is prepared to live within these requirements.

Allow groups to find and select their own facilitators – with boundaries. If a group is going to have a facilitator working with them the first thing is for members to agree on what they want the person to do and what their role will be. This means being clear about goals and elements such as reporting and responsibilities. Only after laying this groundwork should a group choose a facilitator. Facilitators need to be selected (preferably by the group) based largely on their facilitation strengths. They require strong support, both in terms of training in industry issues and in methods of supporting the empowerment process.

Provide support and training for facilitators. A big trap after a group has employed a facilitator is to assume that they can be left to operate without support from group members. Interaction and communication are crucial. The role of the facilitator is to help the group achieve its goals, not to achieve those goals by themselves. Another element is to ensure that facilitators are allowed to take up any training that has the potential to help the group.

Follow an annual planning cycle. It's important for any group to develop a plan of action and identified outcomes. This way, members can check progress and demonstrate that the group is actually achieving what it set out to achieve.

Use benchmarks. This point is linked to the previous one. Benchmarking is a concrete way of showing that the group is making progress. It is essential that the group sets benchmarks against which achievement can be measured. It is also a good idea to encourage individuals to benchmark.

Make sure that the ways that a group evaluates its progress are meaningful and related to the self-empowerment philosophy that the group is based on, e.g. the process used for making decisions, what decisions are made and reasons for them, changes against group developed benchmarks, extent of networking, and confidence and enthusiasm. A checklist for doing this is included in this factsheet.

Early training might be needed for group members in group processes (including conflict management), planning and evaluation.

Provide opportunities for groups and representatives to meet and interact with other groups. Looking at what other people are doing and how they are running their activities is a great way to learn and gather new ideas to apply to your own situation. Take all the opportunities you can to interact with other groups and other group members, e.g. develop partnerships and relationships with government, industry, community and other groups to maximise the benefits to group members.

Provide exposure to the wider picture (scanning) to help broaden options. This point is related to the previous one. All the good ideas don't reside within the group. Take advantage of experience and ideas beyond the group to improve what you are doing.

Encourage groups to become self-funding after an interval. This is a difficult issue but it must be considered, preferably when the group is being set up. The way most government funding works now is that it is available for a specific time period, after which it reduces or disappears. Incorporating strategies and options for self funding when the group is being established will mean that the group will be much better prepared and more likely to be able to continue on after government funding finishes.

CHECKLIST FOR EVALUATING GROUPS

You can use the checklist over the page for assessing where your group is up to and where it might need to focus effort to ensure that it stays healthy. Of course, this is a guide only and these elements may well be varied for good reasons. The aim is not to have a mechanistic and mindless checklist, but to provide a series of prompts to help with refining activities and projects.

| Element | Comments | Ranking (1-5 where 5 is fully covered and 1 is not covered) |
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| Potential participants have expressed/or endorse a need for facilitation assistance. | Impetus could come from either a project team or potential participants themselves. The key point is that it is not imposed. | |
| Groups are self selected. | There are various approaches to self-selection. It is important that members aren't chosen by an outside agency or organisation. | |
| There are participant champions within groups. | Groups work best when there are participant champions who provide leadership and enthusiasm. A danger sign is if your group relies on a facilitator to do this. | |
| Facilitators are selected or endorsed by the group participants. | These could be public, private or community people. | |
| A planning cycle is incorporated into the process. | A planning cycle provides some confidence that issues will be dealt with in a systematic way. This cycle needs to include opportunities to reflect on progress. | |
| Group members have opportunity to receive training in group process and planning. | An assumption cannot be made that people know how to work and plan together and some allowance should be made for this. | |
| Groups meet regularly. | This would be affected by localities and types of issues facing the groups. | |
| Boundaries for use of funder resources and reporting needs are negotiated and agreed to by funding bodies, the project team and group members. | Funding bodies need some boundaries and broad objectives for monitoring and accountability purposes. These boundaries need to be clear, aswell as how they will be reported against. | |
| Opportunities are made for professional development of facilitators and to develop facilitator networks. | Facilitators need to be connected to each other and further develop their facilitation and 'technical' knowledge to ensure they are of maximum benefit to the groups. | |
| Opportunities are made for groups (representatives) to meet and share experiences. | Actions and learning of other groups can provide a significant stimulus to like-groups in other localities. | |
| Group members are encouraged to benchmark their knowledge, attitudes and practices. | Benchmarking is a way of measuring and reinforcing individual and group progress and growth. | |
| Group members contribute an increasing level of their own resources to group activities. | This assists with ownership and sustainability beyond the life of a project. | |
| Courses and workshop opportunities need to be made available to facilitators and groups as part of the smorgasbord of opportunities available to them. | Assurance that groups will hear of potential training opportunities is important so they can make appropriate choices for their needs. | |

About the project

"What Works and Why" was funded by the Cooperative Venture for Capacity Building and Innovation in Rural Industries. The aims of the project were to evaluate extension and education programs being implemented around Australia, looking at best practice as a means of sharing and learning, and to identify how new guidelines, principles and tools will generate effective information and learning.

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