WORKBOOK

Whole Person Process Facilitation

Genuine Contact™ Program – Advanced skills building workshops

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About This Workshop

Whole Person Process Facilitation is advanced skill development module 2 of the Genuine Contact Program. This learning module develops and enhances skills in facilitating meetings in which a frequency is held for people to make life nurturing choices based on what is presented to them to solve within a particular topic and within stated givens.

Your Trainer is authorized by Genuine Contact to facilitate this workshop. Each Trainer is an independent facilitator and teaches the learning objectives according to their individual experience and the emerging interests of the participants. A consistent standard is offered by all Trainers as a series of key learning objectives must always be addressed. Read more about these learning objectives at https://genuinecontact.net/services/genuine-contact-program.

About the Genuine Contact Program

The Genuine Contact Program is comprised of 4 foundational learning modules and 5 advanced skill development modules. The program was designed in a modular way with intention. You will find that what you learn in each module is simple to use and easy to duplicate. Each can be taken on its own (some pre-requisites may apply) to learn a particular skillset. A combination of learning modules can be taken together to deepen your learning in a particular area of focus. The 9 modules can also be taken as a collective for a comprehensive learning program.

The Genuine Contact Program includes:

- Foundations 1: Path to Organizational Health and Balance
- Foundations 2: Achieving and Regenerating Organizational Health and Balance
- Foundations 3: Individual Health and Balance
- Foundations 4: Holistic Leadership Development
- Session 1: Working with Open Space Technology
- Session 2: Whole Person Process Facilitation
- Session 3: Cross Cultural Conflict Resolution
- Session 4: Genuine Contact Organization
- Session 5: Train the Trainer

Supporting Your Ongoing Learning

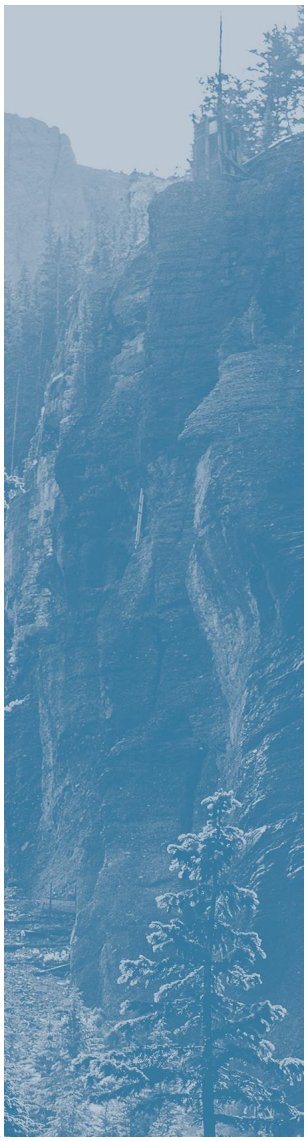
The Genuine Contact Organization is committed to supporting your ongoing learning application and retention as you work with the simple tools, frameworks and processes you will learn here. Additional resources can be provided by your Trainer including supporting articles, artwork such as copies of the tools found here, and other materials.

To continue in your learning, connect with our community of mastery in an ongoing online discussion forum and access a complete library of resources as a member of Genuine Contact. You can learn more at genuinecontact.net/membership.

While this workbook is being provided to you in English as part of your learning program, it may also be available in other languages. Please contact your Trainer if you would like to receive a copy in another language.

Content

In this learning journey, we will explore:



Introduction
and Orientation

Solutions, even to seemingly impossible problems, are possible through conversation
~Birgitt Williams

Whole Person Process Facilitation creates the container, the process and the meeting culture for people to contribute the best that they have to offer individually and collectively in meetings and in workshops. The individual, the group and the organization benefit. This is based on the understanding that when the whole person participates with their multiple intelligences including mental, spiritual, emotional, and physical intelligences, ideas, innovation, and solutions arise that lead to the best course of action.

People shift easily to an opportunity focus, leaving behind a problem focus. Whole Person Process Facilitation is invitational. The facilitator guides, yet is non-intrusive. When everyone in a group is invited to be their whole person within the group process, all are learning together and contributing to the greater and evolving wholeness, within a whole and evolving universe. Divisive situations transform into something that works.

What is the invitation?

Critically important for the best to emerge in people is an environment that embraces and benefits from diversity, inclusion, equity and belonging. The Whole Person Process Facilitation meeting culture has consistently, and cross culturally, created the environment and conditions for belonging.

Imagine the difference that is possible when people no longer park part of themselves at the door when they enter a gathering or a meeting. Imagine them bringing their whole selves with their knowledge, wisdom, and multi-intelligences in support of what is being discussed, considered, and acted on. When you imagine the benefits that this would be for families, teams, communities, and many variations of public and private sector organizations, you start to understand what we invite you to in a gathering, meeting or workshop using Whole Person Process Facilitation (WPPF).

People tell us it feels like magic when formerly divisive situations become life nourishing, collaborative, and empowering. Within a WPPF meeting or gathering, people shift away from a problem focus to a focus of co-creating the personal, professional and community path forward that they deem best individually and together.

To understand the power of using WPPF for a meeting, conference, or workshop, it is helpful to envision the three roles of WPPF that are interrelated. One role is that of a life nourishing operating system or container within which people have their experience. The second role is a guided, yet non-intrusive, facilitation process with a simple form for the handling of complexity. The third role is the establishing of a meeting culture. This triple role of WPPF enables people to focus on the content of what they have come together to do in ways that are not possible when the container is not present, when the facilitation process is intrusive and when there is no intentional establishment of a meeting culture.

Why use this approach?

Wholeness is our natural state. When we allow for this natural state to show up and be fully present, to contribute, to learn, and to make plans, the outputs and outcomes in any meeting are simply greater than is possible when people feel restricted from being their whole selves.
Using WPPF we are leaving behind an environment that was fostered for many decades of leaving what was referred to as your baggage at the door and showing up into a narrow definition of what the person could show up as. That environment was restrictive to the degree that it also restricted the benefits that could come from the multiple intelligences that are part of every human.

The Whole Person Process Facilitation environment created by its triple roles provides expansiveness rather than restriction. People are invited to bring their whole self to the extent that they individually feel comfortable doing so. With the whole self comes multiple intelligences. When the multiple intelligences of every individual have the opportunity to collaborate with the multiple intelligences within the group, they bring more possibilities for consideration. This leads to having conversations that need to be had to overcome stuck places. Every person can contribute and do their part more fully as the whole unit finds solutions and a more life nourishing way of moving forward together.

With frequent use of WPPF meetings, and especially when a choice is made to use WPPF meetings as a consistent meeting format in a family or organization, individuals and the collective grow in their capacity to function with their whole person, with their multiple intelligences in every moment. People learn, people contribute, individually and collectively, for the benefit of themselves, the group, and the enterprise.

Who needs to be involved?

Ideally, everyone who has a stake in sorting out whatever needs to be sorted in a meeting needs to be involved. This is an approach that bridges the silos that all too often have developed in any organization, be it family, team community, or organization. During the meeting itself, the

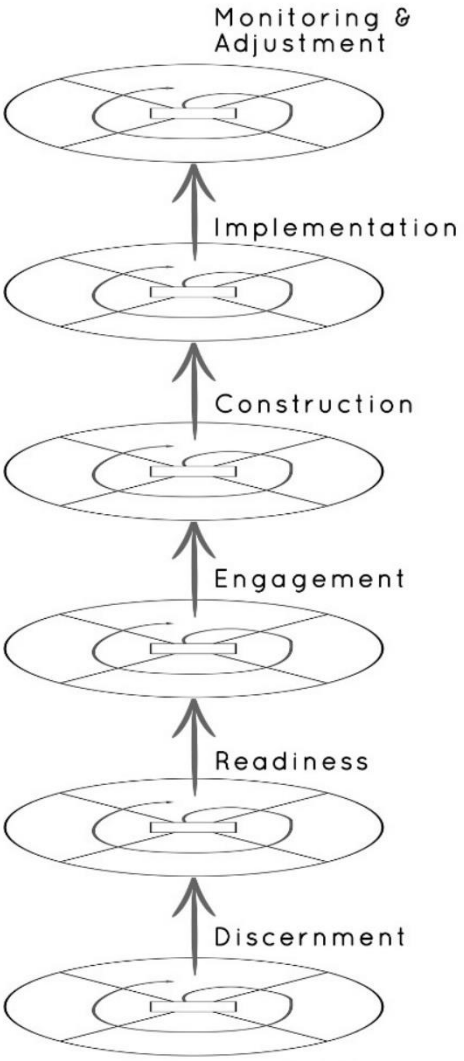
individuals gathered conduct themselves as an interactive organization, finding their solutions in the cross-functional conversations.

For families, communities, and organizations that are committed to creating conditions of belonging, those organizations willing to go beyond the token acknowledgement of diversity, equity, and inclusion to really create themselves in a way that diversity, inclusion and equity are deeply valued, the frequent use of Whole Person Process Facilitation facilitates the conditions for belonging.

People use Whole Person Process Facilitation process and tools even as individuals, as couples, and as families to create more life nourishing rather than life depleting conditions for themselves and carrying out their lives. A functional team, using Whole Person Process Facilitation for all its meetings increases its individual and collective capacity to work with opportunities for the best outcomes, and to overcome challenges in ways that keep people engaged. And, speaking of the engagement of people, employee satisfaction in meaningful work increases.

How does it work?

Learning in this module is offered through 6 phases of learning, based on the Evolutionary Spiral. One of the multi-use tools that make up the Genuine Contact Toolkit, the Evolutionary Spiral offers a roadmap of your learning and development. Every phase provides the tools and tips for taking people through a Whole Person Process Facilitation meeting, the Genuine Contact Way.



Evolutionary Spiral

1. **Discernment:** In this turn of the evolutionary spiral, you will begin by discerning your expectations of operating systems, process facilitated meetings, and meeting culture. You'll have the opportunity to create definitions that capture your perceptions of meetings, process facilitation, and whole person. You'll develop clarity about what you need for process facilitation. You will be presented with five beliefs for the purpose of examining your worldview and considering their implications for your Whole Person Process Facilitation work

2. **Readiness:** In this turn of the evolutionary spiral, you will learn what you'll need to do to ensure sufficient readiness in yourself and in an organization for successful work with Whole Person Process Faciliation. You'll be guided in developing a readiness checklist complete with actions that you can take towards readiness. Readiness of the facilitator requires a commitment to increasing self awareness. Readiness of the organization requires careful planning for the meeting.

3. **Engagement:** In this turn of the spiral, you will have the opportunity to explore engagement. We will introduce two aspects of the human that need to be considered when contemplating engagement. You'll have the opportunity to work out a plan for engaging yourself in the meeting, engaging the sponsor(s), and engaging the people in the organization.

4. **Construction:** In this turn of the spiral, you will have the opportunity to make use of everything that you learned in the Discernment, Readiness and Engagement phases as you get yourself oriented to designing a meeting using Whole Person Process Facilitation. You will be walked through an exploration of cooperative meeting components that make up a Whole Person Process Facilitated meeting then onwards to practicing a design of a Whole Person Process Facilitated meeting. Following this exploration and practice, you will have your turn to design a meeting that you can imagine using fairly soon after learning this module.

5. **Implementation:** in this turn of the spiral you will have the opportunity to examine the importance of planning for implementation from the beginning of your work with the WPPF meeting; to understand that there is a difference when the facilitator has a mandate to help guide implementation or only to prepare for implementation; the benefits of a single meeting using WPPF and the impact on the organization of frequent and regular meetings using WPPF.

6. **Monitoring and adjustment**: in this turn of the spiral, you will be asked to do some monitoring and adjustment of your learning in this module. This orients you to monitoring and adjustment as an energy of flowing forward to the best possible future. You'll be oriented to two categories for the monitoring and adjustment of the meeting in the organization, one regarding the meeting using WPPF and the second regarding implementation of the outcomes of the meeting. Some examples of monitoring and adjustment are provided.

The module is designed with follow-on facilitated peer-with-peer mentoring circles to support your ongoing learning with Whole Person Process Facilitation the Genuine Contact Way. These mentoring circles include group discussions facilitated by a Genuine Contact Trainer about what has been learned while applying your learning. This allows for deepening your learning and your facilitation through action/reflection adult learning.

Origin story of Whole Person Process Facilitation

The origin story of Whole Person Process Facilitation is told by Birgitt Williams, co-creator of the Genuine Contact Program and Genuine Contact Way of working and living. Birgitt developed WPPF.

The origin story of Whole Person Process Facilitation is intertwined with my personal story. The only way for me to tell the origin story of Whole Person Process Facilitation is to tell a bit of my own story.

In my early 20s I chose a career path as an organizational consultant with a mission of enabling individuals to access their potential and committed to enabling organizations (a collective of individuals) to access their potential. I wanted to find a way to help systems and organizations to change.

I am convinced that we each can work with more of our personal potential, tapping into our best. I believe that tapping into this potential when humans come together in organizations taps into greatness. That this whole is indeed greater than the sum of the parts. It is my belief that we can be successful as individuals and as organizations way beyond our expectations.

I was on a personal quest to figure out the best ways to do this work that I was committed to.

In my undergraduate and post-graduate studies, as well as in continued professional development, I have studied a lot about people via psychology, philosophy, anthropology, the great masters of religious traditions of both the east and the west, as well as the practice of Indigenous Peoples around the world including the wisdom of the ancestors that has been passed down. I have studied behavior and learning in individuals, couples, families, and organizations. My studies took me through current thinking of cognitive development, of memory and intelligence, behavior modification, Gestalt, and Jungian psychology.

I was deeply influenced by the research and findings of my undergraduate thesis on intelligence in children under five years of age who were non-verbal. I worked with my professor in cognitive development, Dr. Linda Segal, who had developed a means of IQ testing for young children that was not based on verbal skills. The group of children I worked with all participated in a nursery school at a hospital for children who were thought to be delayed because they were still not speaking. Some were identified as autistic, some assumed to have early onset of other psychiatric illnesses, and some who were a mystery as to why they did not speak. Through the testing, and the testing of a "control group" of children who were verbal, our research showed that there was no difference in the intelligence quotient between the two groups.

The non-verbal group had previously been written off as also not having sufficient intelligence. Our work influenced how they were thereafter viewed in terms of inner knowledge and intelligence, in fact, multiple intelligences. It was my first conscious and concrete experience that there was much more going on in humans than is generally acknowledged.

My experience, education, and background mixed with my own inner knowing, and I developed the work that I do with individuals and organizations, knowing how little we really know about the potential of humans, yet believing in this potential. I realized that the more structured the approach, the less likely that the approach would result in a truly tapping into potential.

I was interested in the development of process theology, and later in quantum physics. In my mind, there was a relationship between the two, mostly that everything isn't what it appears to be, and that everything is connected.

I was interested in how adults learn at the Ontario Institute for Studies in Education. This led me to learning from one of their graduates, a former nun who taught process facilitation. My learning with Dr. Marge Denis took four weeks of a deep dive into process and into intuition.

All my learning and experiences culminated in the development of Whole Person Process Facilitation because I was on a quest for changing systems and organizations, with a commitment to working with the potential of people both individually and in groups. The very specific catalyst for developing Whole Person Process Facilitation was the four-week program of Dr. Marge Denis, in northern Ontario, Canada. Process and intuition would become two of the key ingredients in Whole Person Process Facilitation.

Since that initial development in the 1990s, Whole Person Process Facilitation has been continually developed and fine-tuned through the experience and feedback of thousands of meeting, conducted by facilitators on every continent. It is proven cross-culturally and over time to make a meaningful difference in enabling individuals and organizations to more fully access and work from their potential.

Five Beliefs of Genuine Contact

Underpinning this module of the Genuine Contact Program are the five beliefs that Genuine Contact is rooted in. These inform our way of working and are one of the core concepts foundational to the Genuine Contact Way and explored deeply in the book *The Genuine Contact Way: Nourishing a Culture of Leadership*.

As you learn Whole Person Process Facilitation the Genuine Contact way, we offer you these five beliefs. We offer nothing more about these beliefs at this time as it is important for you to draw your own insights, understandings, and possible conclusions about the relationship of these five beliefs and Whole Person Process Facilitation. You are invited throughout your learning to explore how paying attention to these five beliefs affects the way cross Whole Person Process Facilitation work is approached. As you carry out your learning, it is also useful to include how not paying attention to these five beliefs affects the way Whole Person Process Facilitation work is approached.

1. **We believe that every organism (including the organization) has within it the blueprint for its own optimal health and balance.** We trust the people in the organization to know what is needed for optimal effectiveness. Building on the strengths within the organization is a key to optimal effectiveness.
2. **We believe that focusing on genuine contact enables individuals and organizations to achieve the individual and organizational health and balance that is needed for optimal effectiveness.** Positive change in the organization is directly linked to positive change in individuals. Both are required for sustainable new ways of working.
3. **We believe that Spirit or spirit matters (conscious energy), that through spirit or Spirit all creation is connected, and that people are precious.** Our experience is that strategies based on these values have exciting, tangible results.
4. **We believe that change with its accompanying loss, grief work, and conflict is constant.** Individuals and organizations that develop mastery in working with change can sustain optimal effectiveness. These leaders and organizations recognize that change cannot be managed, that energy spent trying to manage change is wasted energy, and that productive use of individual and organizational energy is achieved by working with change rather than against it.
5. **We believe in keeping it simple.** Simple frameworks and processes enable success with complex situations. In keeping it simple, we recognize that any sustainable change must begin from the inside and cannot be externally initiated or driven.

1. Discernment

Go slow to go fast.

~Birgitt Williams

In this turn of the evolutionary spiral, you will begin by discerning your expectations of operating systems, process facilitated meetings, and meeting culture. You will have the opportunity to create definitions that capture your perceptions of meetings, process facilitation, and whole person. You will develop clarity about what you need for process facilitation. You will be presented with five beliefs for the purpose of examining your worldview and considering their implications for your Whole Person Process Facilitation work.

Your starting point: establishing baseline measures

Answering the reflection questions in this section provides an opportunity to examine your baseline measures to capture your perceptions of Whole Person Process Facilitation.

To continue to support your preparations for learning, you are invited to answer the following reflection questions using a scale of 1 to 10, with 1 as low and 10 as high.

How much do you feel that you know about Whole Person Process Facilitation?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about helping an organization get into readiness for a meeting or workshop using Whole Person Process Facilitation?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about engaging the people of an organization in a meeting or workshop using Whole Person Process Facilitation?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about constructing a design for your meeting or workshop using Whole Person Process Facilitation that leads to successful implementation?
1 2 3 4 5 6 7 8 9 10

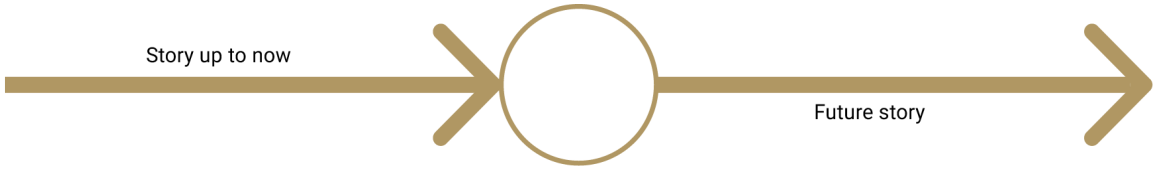
How much do you feel that you know about implementing the agreed on actions resulting from a meeting or workshop facilitated using Whole Person Process Facilitation?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about monitoring and adjusting the agreed on actions over time following a meeting or workshop facilitated using Whole Person Process Facilitation?
1 2 3 4 5 6 7 8 9 10

Over time, you may find it beneficial to return to these questions and ask them of yourself again. Checking against your baseline measurements over time can support you in tracking your progress in working with Whole Person Process Facilitation.

Your story

At this moment in time, you have chosen to learn about Whole Person Process Facilitation. You have a story that has led you to this learning. We offer you the Storyline, a Genuine Contact tool, as a visual to prompt you to access your story. What is the story that led you to this learning? What is the story that you are imagining regarding your meeting facilitation after this learning? You have a story, even if you don't have details figured out.



Notes:

Motivation

Telling a story provides additional information, something that you might know without actually knowing it. Based on the story you have told, what do you now know about your motivation for working with Whole Person Process Facilitation? Your motivation affects the spirit with which you facilitate. It is important to know your motivation so that you can figure out the effect that your motivation has.

Notes:

The experience of Whole Person Process Facilitation

People tell us that they experience magic in a Whole Person Process Facilitated meeting, and as a result of a WPPF meeting. We have some idea about how this experience is created. Aside from the full presence of the facilitators, there are three cooperative components of a WPPF meeting that create this experience. The three components that are interrelated are:

- WPPF as a platform or operating system
- WPPF as a process or method
- The meeting culture of a WPPF meeting

To discern your understanding of these three components, without thinking specifically about WPPF, please answer three questions together.

1. What do you expect from an operating system?

Notes:

2. What do you expect from a process facilitated meeting?

Notes:

3. What value is provided by having a meeting culture for a single meeting and more broadly, for an organization?

Notes:

Your perspectives

What we offer in WPPF is not the "only way" to facilitate participatory meetings. We can say that it works, has a good track record, is transferable to any situation, is a platform within which other facilitation methods and tools can be used, is duplicable and is simple. The whole person is invited, process facilitation brings out the best in the people involved, and a lot gets accomplished in meetings facilitated using WPPF. Before we head into more about WPPF, it is important to understand your perspectives about three terms that we are using.

In your perspective at present:

1. What is a meeting?
2. What is whole person?
3. What is process facilitation?

Notes:

Learning summary

You have gone through many activities to discern your current understanding about WPPF and to create baseline measurements. As we come to the end of this turn of the evolutionary spiral, you are invited to review your notes, reflections, and insights and to do a brief and clear summary of what your discernment produced that you feel is important to remember or refer to.

Notes:

2. Readiness

When so much is at stake, preparedness demonstrates respect for the people
~ Birgitt Williams

In this turn of the evolutionary spiral, you will learn what you will need to do to ensure sufficient readiness in yourself and in an organization for successful work with Whole Person Process Facilitation. You will be guided in developing a readiness checklist complete with actions that you can take towards readiness. Readiness of the facilitator requires a commitment to increasing self-awareness. Readiness of the organization requires careful planning for the meeting.

Readiness of yourself

It is important to examine the value of how you show up as a facilitator of people and what you need to have as a plan for your ongoing self-development. More than any tool that you have in your toolkit, how you show up affects how successful you will be in this very important work. To be really good at facilitation, you will discover that you are required to enhance your self-awareness. This requires that you do the work of learning to be consistently in genuine contact with yourself.

Genuine contact with self

Being in genuine contact with yourself is vital for being in genuine contact with others. People in a process that you are facilitating require you to have the capacity to be in genuine contact with them. Being in genuine contact with them is on shaky ground if you bypass doing the work of being in genuine contact with yourself. Keep in mind though that increasing genuine contact with yourself is a lifelong journey as you grow and evolve. This means that being committed to increasing genuine contact with yourself and undertaking some work in doing so is enough for you to be in some degree of genuine contact with others.

Genuine contact operates within the invisible world, beyond the five senses. You have experienced this invisible world if you have ever attended a party and watched people entering the room - some seem to light it up and fill the space with positive energy. Others slip in hardly noticed. You picked up on what was happening in the invisible world. You picked up on their energy, on the seemingly invisible world.

When you're in genuine contact with yourself, people sense your wholeness. When you show up with confidence, they perceive that your confidence is true. When you are not in genuine contact with yourself, people sense any disconnect that you have with yourself. When you show up with confidence that isn't based on genuine contact with yourself, they perceive that your confidence may be a mask, rather than you. Your facilitation is impacted either way.

It is helpful to have a regular practice to strengthen your awareness of your genuine contact with self, to strengthen your sense of wholeness. Wholeness is your natural state. It is the natural state of all people.

Based on your preferences, the activities you engage in to strengthen genuine contact with self could be meditation, yoga, tai chi, walking/sitting/lying/standing in nature and/or journaling. A very simple practice that you could begin tomorrow that doesn't take much time is as you wake up, and before you get out of bed, to notice if your sense of self-love is bigger than your sense of self-critic. Note that self-love is an experience of the heart as the dominant communicator, and self-critic is driven by the mind. For those mornings where the self-critic feels bigger, choose a practice that feels right for you to shift to the feeling of self-love, even if it's only reaching 51% self-love and 49% self-critic. It is enough. The simplest activity, found in many cultures, is to place your hands on your

heart, conveying to your heart that you touch it to accept it's dominance. An activity that can help is to imagine something that you love, like a pet. Feel that love and then symbolically put that feeling into your hands and put your hands over your heart, enhancing the love you feel. Basically, as you do this or a similar activity, you are shifting your vibratory field to the field of love.

A baby is in genuine contact with self, possibly unaware that this is so, or that there is a different way to be. By about age three, a child has already developed a number of masks, realizing that there can be some negative consequences to being their genuine self in all moments. Development over time includes showing up from the genuine self, and showing up in the way that conditioning has taught. Patterns develop. A pattern takes us further from being our genuine self or being more in tune with being our genuine self. The invitation for being the best facilitator you can be is an invitation to break patterns, increasingly so over time, to show up to yourself and others more congruently with who you are.

As you develop a plan for yourself for being in more genuine contact with yourself, allow yourself to take small steps. You are stepping out of those old powerful patterns, embracing patterns that take you increasingly into genuine contact. The heart dominates, communicating to the mind and coherence between the two is achieved.

What can you imagine doing soon to be more congruent with yourself.

Notes:

Be impeccable with your word

In every moment that you speak, people pick up whether you mean what you say or are saying something that you don't really mean. Likewise, people are aware when you do what you said you would do, or when you do not do what you said you would do. Your facilitation is impacted either way.

You can make a practice of developing awareness of what you say and then taking steps to do your best to follow through on your words. Here are some tips to get started:

- Avoid 'sort of' language.
- Avoid saying what you don't mean.
- Avoid blame, judgment, and 'shoulds'.
- If you say you are going to do something, do it.
- If you make a promise, keep it.
- If you cannot fulfill what you said you would do, or the promise you made, go back to the person (people), and say so with apology.

It can be helpful to take each of these points and be in the discipline of practicing them for a month to build the habits that help you walk your talk, building your capacity over time with practice.

With this reminder about walking your talk, you might have thoughts stirred up in you about how well you are already doing so, and how much room there is for this aspect of your development. To the best that you can, be careful to avoid judging yourself. Instead, undertaking this aspect of your development from a perspective of noticing and adjusting is a healthier, more neutral stance.

What insights do you have about a practice of being impeccable with your word?

Notes:

Four Fold Way

We encourage facilitators to take up a practice known as the Four Fold Way as captured in the book *The Four Fold Way: Walking the Paths of the Warrior, Teacher, Healer, and* Visionary by Dr. Angeles Arrien, based on her research of what was common among Indigenous Peoples around the world.

We have taught this practice to facilitators for more than two decades, resulting in facilitators learning to show up genuinely and confidently in their facilitation.

The Four Fold Way, each rooted in a universal archetype, is:

- Show up, or choose to be present.
- Tell the truth without blame or judgement.
- Pay attention to what has heart and meaning.
- Be open to outcome, not attached to outcome.

We recommend practicing each one separately for a month, integrating the practice into your life.

What insights do you have about working with the Four Fold Way to strengthen your ability to show up genuinely and confidently as a facilitator?

Notes:

Developing yourself in how you show up as a facilitator takes time, it is a development process to be viewed as a marathon, not a short sprint. The first step in your readiness is your awareness of how you are showing up. The second step is having a daily, weekly, monthly plan for yourself to increase your congruency with your genuine self, with mind, heart and action being in alignment. The third step is following your plan, every day.

Are you in readiness to facilitate Whole Person Process Facilitation if you are at step one? The answer is a resounding yes. There are increasing amounts of readiness as you continue to develop with a view to strengthening your alignment with your genuine self. As you make notes for yourself about your personal readiness, can you imagine being helped in your commitment by having a visual aid with some kind of plan for going forward that you create and can post on your wall? If yes, take time to make the visual aid so you are tapping into your wisdom, your creativity, and your intuitive knowing of what is right for you.

Notes:

Readiness of the organization

Taking what you know about achieving readiness for yourself, the next step of readiness is to apply this knowledge to readiness of the organization for a meeting, conference, or workshop.

Readiness in the organization does not lie in developing a logistics list at the start of your process. A Genuine Contact tool that can be helpful in guiding your thinking about readiness is the Medicine Wheel Tool.

The Genuine Contact process for working with the Medicine Wheel Tool is to begin in the center, identifying purpose, then northward to leadership, and around through vision, community, management, and relationships. The process then continues outward to look at the circle of the whole, and the environment within which the whole organization operates.

Using the Medicine Wheel Tool as a guide, you can examine the readiness in an organization for a participatory meeting. In each of the eight components, there are questions to be explored. One example of the questions is:

- Purpose – what is the purpose of the meeting?
- Leadership – is the formal leadership aware of this meeting and committed to a participatory meeting?
- Vision – what outcomes are anticipated as a result of this meeting?
- Community – are the people in the organization ready for a participatory meeting at this time? Are they ready for the purpose of the meeting?

- Management – are logistics thought through and ready to be carried out?
- Relationships – what is the relationship of the formal leader(s) to the participatory meeting? Are they ready to be equal participant(s) alongside their employees?
- Circle of the whole – what is now known about the meeting as a whole? Do you know that you have the right theme for the meeting, the right objectives, the right length of time, and clarity about the expectation zone or givens?
- Environment – is there anything that is in the environment that can affect the meeting?

Please imagine an organization that has asked you to facilitate a meeting. Think about the answers that they would likely give to you as you ask these questions.

Notes:

Did you find using the Medicine Wheel Tool helpful to determine readiness for the meeting, conference, or workshop? What notes do you wish to capture about the usefulness of this framework for readiness?

Notes:

If you felt the Medicine Wheel Tool was useful in determining readiness, you may be thinking about different questions in each of the eight components that you would prefer. It will be helpful to keep a record of these different questions in a place where you can reference them when designing WPPF meetings. We call this your facilitator toolkit. Please do note them and use them. Over time, you may find even more questions that work for what you are wanting to accomplish with readiness.

Now, imagine the same organization and that you are about to embark on readiness work with the sponsor(s) of the meeting. You have the questions that we outlined and don't yet have answers. In this example of using the Medicine Wheel Tool, you don't ask the questions at the start. Instead, you go through what we present below as the pre-meeting (planning meeting). Once you have gone through the process we outline, come back to the Medicine Wheel Tool and the questions we have posed for each component. You will be invited to reflect on the value of the process in getting answers and decide if it is worthwhile for you to go through the pre-meeting process in the more robust form we suggest.

Planning meeting

Within our Genuine Contact way of working, we designed the format of the Planning Meeting specifically for meeting methods Open Space Technology and Whole Person Process Facilitation. However, it is beneficial to use when contemplating any type of participatory meeting, no matter the method to be used.

In calling it a planning meeting, you might be thinking of logistics – date, time, location, supplies to be organized, etc. The Genuine Contact way of working takes a broader view on planning, first ensuring that the purpose for the meeting is carefully thought through and is appropriate for the organization at this time.

Before facilitating a participatory meeting, you will want to determine whether:

- the theme/agenda for the meeting is the right one
- the length of time for the meeting is right
- the constraints around the outputs from the meeting are clearly stated before participants get started
- a participatory meeting is appropriate based on what you have discovered
- there is commitment for a participatory meeting

To do this, we recommend a pre-meeting conversation with the sponsor of the meeting. The sponsor of the meeting is the person, or small group of people, who are inviting to the meeting and who are responsible for the meeting and its outcomes. It's important that this person, or at least one person in a group, has decision-making authority for the meeting and its outcomes.

This planning meeting is facilitated using WPPF and takes place between the facilitator and the sponsor. Ideally, this conversation takes place before the invitation to the meeting goes out to those who will participate.

Organizing the logistics for this planning meeting includes consideration for:

- Who will attend?
- How will the formal leader of the organization be involved in the planning?
- Will the meeting be in person or online?
    - In Person

- Place for the meeting is comfortable and set up in a circle with no tables.
- Beverages are available. Healthy snacks are made available if appropriate.

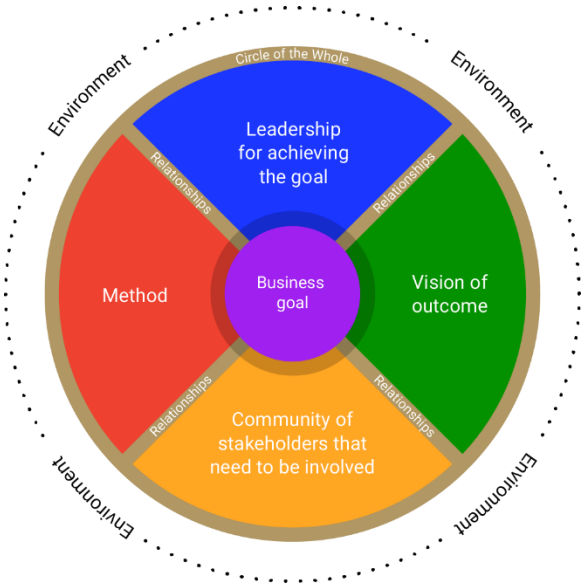
- Online
  - What is the meeting platform for audio/video?
  - What is the meeting platform for collaboration and notetaking?

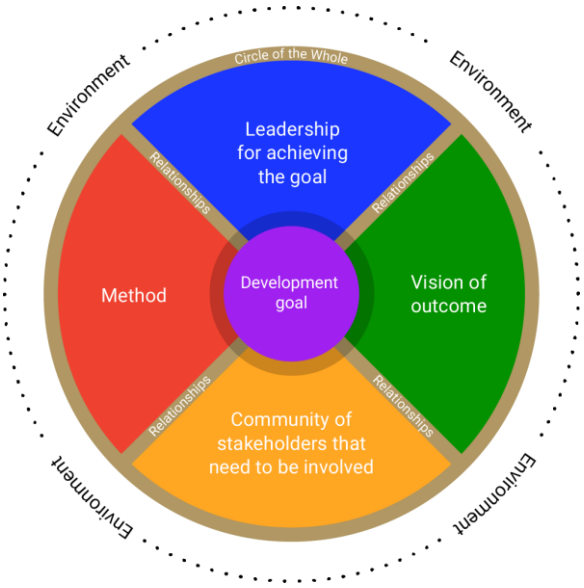
We use a few simple framework tools to guide the conversation and through these simple tools we gain the information that we want to determine. The planning meeting is usually two to three hours long yet can be done in one, especially if the sponsor is already familiar with the Genuine Contact Tools.

Service delivery model

The Service Delivery Model is a framework for the whole meeting. It should take no more than fifteen minutes to discover the information that each of the tools helps to produce.

We begin with the Service Delivery Model, a version of the Medicine Wheel Tool. To use the Service Delivery Model, the order is very important to get the most beneficial results just as it is with the Medicine Wheel Tool. The starting place is the center. One version of the Service Delivery Model has “business goal” in the center and the other version has “development goal” in the center.





Sometimes a meeting or workshop is intended to achieve a business goal - a specific work task or activity that must be accomplished. Sometimes it is intended to achieve a development goal - building or strengthening capacity in people or the organization by developing new skills, strengthening relationships, or undertaking other developmental activities that will support people to work together in new or improved ways.

That is the first distinction that is made in this planning meeting. Start by asking the sponsor what their goal is for the meeting. What is it they want to accomplish? Probe beyond the initial answer to find clarity together about their goal so that you understand if it is a business goal, development goal, or possibly both goals that the meeting is intended to accomplish.
Continuing to work with the Service Delivery Model, the next discovery elements to explore, in order, are to find out:

- what is known about leadership for the meeting or workshop including what is known about leadership post-meeting to move any actionable items forward
- the expected outcomes
- the community of stakeholders that should be involved so that the goal and expected outcomes are achieved

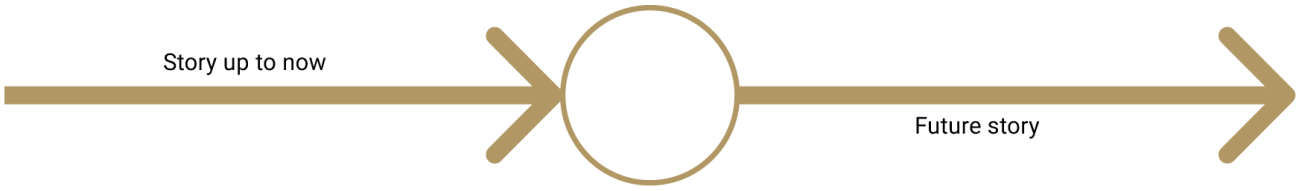
At this point in the Service Delivery Model, you and the sponsor have a good amount of information about what this meeting or workshop is intended to be.

There is one element of the Service Delivery Model that is left to discuss, and it is the method. You will invite the sponsor to go through a few additional tools so that together you can establish if a participatory method is appropriate, the length of time needed, and gain clarity about the teaching or activity objectives. The exercise of going through these tools as lenses to look at to examine both the organization and the meeting to gain clarity on the method.

Insights on using the Service Delivery Model

Notes:

Storyline

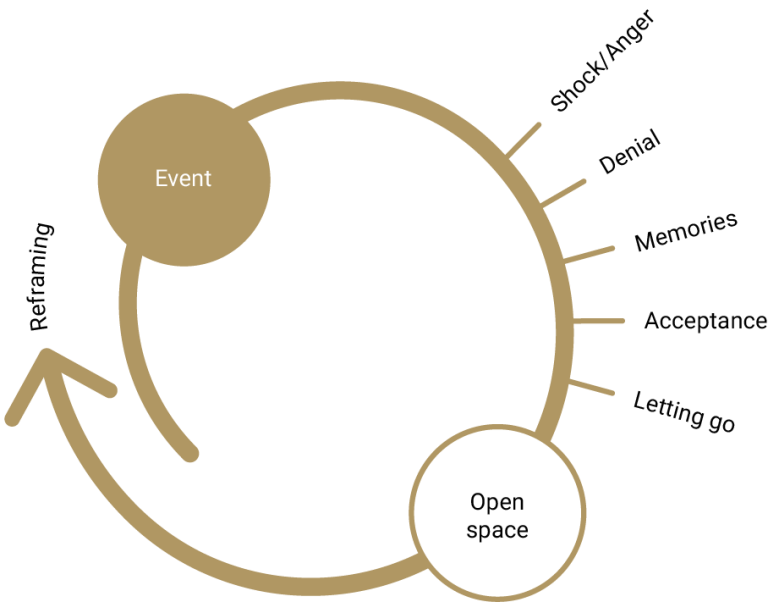


Ask the sponsor to tell the story that led up to the meeting, telling it from their own starting point, in the order that they choose, and highlighting what they choose. When there is a team of sponsors, each person should share their parts of the story. The facilitator can pick up information here, like any points of the story that are about successful or non-successful meetings in the past, including what happened after the past meetings. You're also listening to see if the story they tell aligns with what you already know from the work with the service delivery model.

When the story leading up to the meeting is complete, next ask the sponsor to tell stories of what they expect after the meeting. The key to look out for is whether the expected outcome is what the sponsor wants to happen, without also offering other possible outcomes. In other words, if the sponsor is attached to a particular outcome and hopes that the facilitator will steer the meeting to that outcome, a participatory meeting is not appropriate.

Notes:

Grief cycle

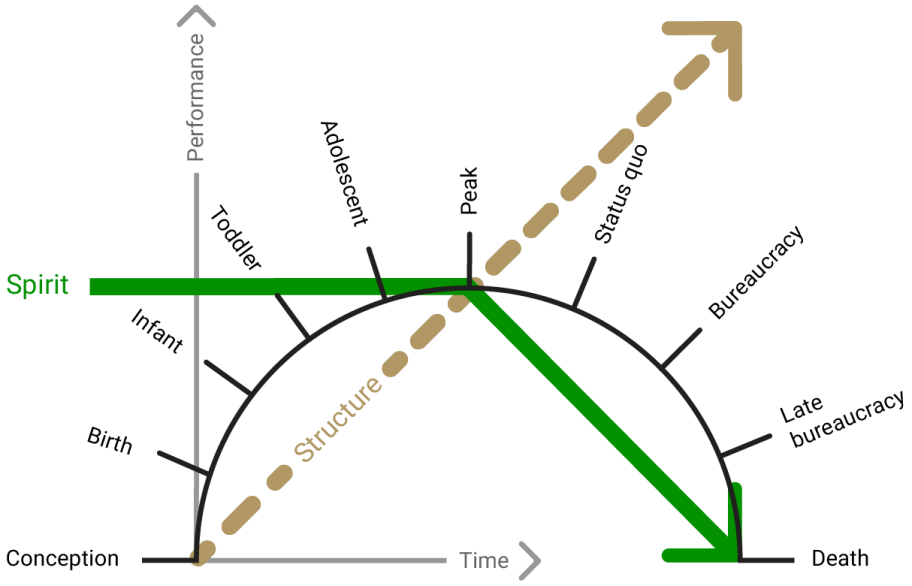


Next, the facilitator introduces the Grief Cycle, explaining this is an oversimplified version of the tool, first developed by Elisabeth Kübler-Ross, and used here for the purpose of stimulating insights and conversation. This Grief Cycle begins with an event, through which there is change and hence loss, and goes on through stages of shock, anger, denial, memories, acceptance, letting go, the open space of possibilities and reframing. Ask the sponsor to identify where they perceive their organization to be on the grief cycle. With a sponsoring team, each person gives their answer, with no need to agree on one point. Ask why they think the organization is where they have chosen.

The results give a clue as to whether the theme and objectives for the meeting are the right ones. For example, if the sponsor identifies that the organization is in shock/anger or denial, it is not the right time to have a meeting that is about the future. People in these early stages of grief have great difficulty with the creativity needed to think about the future. They do best if the objectives of the meeting are about the present.

Notes:

Organizational lifecycle



The next tool used in the planning meeting continues with our choice to use simple versions of diagrams for the purpose of stimulating both conversation and discovery. This one is the Organizational Lifecycle by Dr. Ichak Adizes, following along a similar path to the human lifecycle. We orient the sponsor to the stages and ask the sponsor to identify what stage they perceive their organization or team to be in. The stages on the left are stages of growth from conception through birth, infancy, toddler, adolescent, and if all goes well, reaching peak performance or maturity.

You will note that the horizontal axis is time, and the vertical axis is performance, meaning this organizational lifecycle portrays the cycle of performance over time. The other axis shown that cuts across performance over time is spirit. During growth, the amount of structure increases and the spirit in the organization is high. At peak performance, the stage of maturity, structure is appropriate to what needs to be done, it supports the spirit in the organization, performance is high with a balance of structure and spirit.

The right side of the bell curve depicts a decline in performance over time. Structure has continued to grow and is no longer the balanced amount of structure to keep the spirit in the organization high. In fact, with too much structure, as well as a decline in performance, there is a decline in spirit in the organization as it goes through stages of status quo (we've always done it this way…), through early and late bureaucracy and finally to death. Death is not necessarily the death of the enterprise. It is the death of performance. Sometimes, in government agencies that are funded by taxes regardless of performance, or other organizations that have income regardless of performance, they can stay in late bureaucracy for a long time, almost into death, yet not quite there.

After orienting the sponsor to the organizational lifecycle, the facilitator asks the sponsor to note where they perceive the organization to be on the lifecycle. Again, if it is a team, they each make

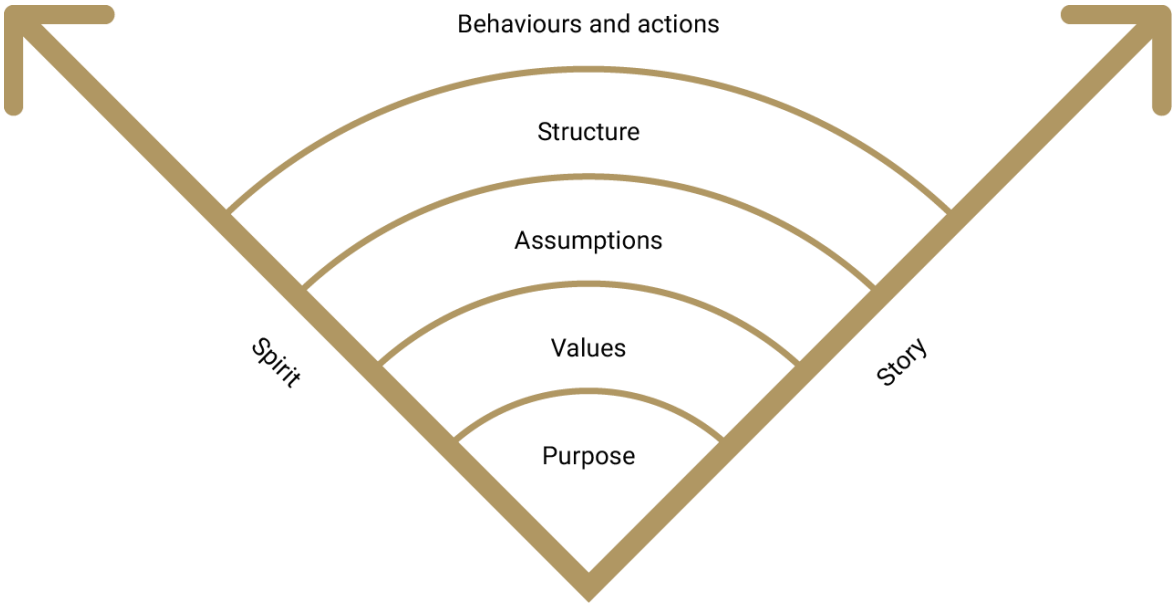
their own note with no need to agree. If they note that the organization is functioning on the right side of the bell curve, a common question here is “is there any way to stop the decline and improve the spirit and performance in our organization?”. The simple answer is “yes”. The topic that needs to be addressed is structure, with a view to adjusting the structure, usually reducing it, to support improved performance and spirit in the organization.

This conversation and discovery may cause the sponsor to make some adjustments to the objectives of the meeting, possibly even to the goal of the meeting.

As the facilitator, it gives you some clues as to whether or not the goal and expected outcomes are suitable in relation to where the organization is in its lifecycle.

Notes:

Deep essence tool



Using the Deep Essence Tool, you, with the sponsor, have another lens to look at the organization. Begin with the radial arm for Story and acknowledge that the story of what led up to the meeting and what is anticipated to follow has already been explored through the storyline. Now, remembering the story, go to the other radial arm for spirit and ask for words that come to mind when thinking about the story. Make a list of these words and indicate that these words represent the spirit of the organization.

Then work through the layers from the bottom to the top, placing the purpose of the meeting in the purpose layer, then on to the values of the organization pertaining to meetings, assumptions about the meeting. At this point, you have added information on whether a participatory approach is valued, whether the contributions of all the people are valued.

In the structure layer, acknowledge that there will be minimal structure to support maximum freedom for participants to express themselves and have conversations. Then ask what the sponsor believes the behaviors and actions in the meeting are likely to be.

You and the sponsor will have more information about whether there is commitment to a participatory meeting, whether what people contribute is going to be valued.

This is also the opportunity, when discussing maximum freedom within minimal structure, to explain that in a participatory meeting such as Open Space Technology or Whole Person Process Facilitation, the behaviors and actions of the sponsor are to be equal to other participants, with the sponsor participating fully. The behaviors and actions of the facilitator provide some guidance and then are non-intrusive. In other words, in a participatory meeting, the facilitator sets the minimal

structure in place and gets out of the way when participants are having their conversations, with no steering from the facilitator if the sponsor feels that the participants are not going in the preferred directions with content.

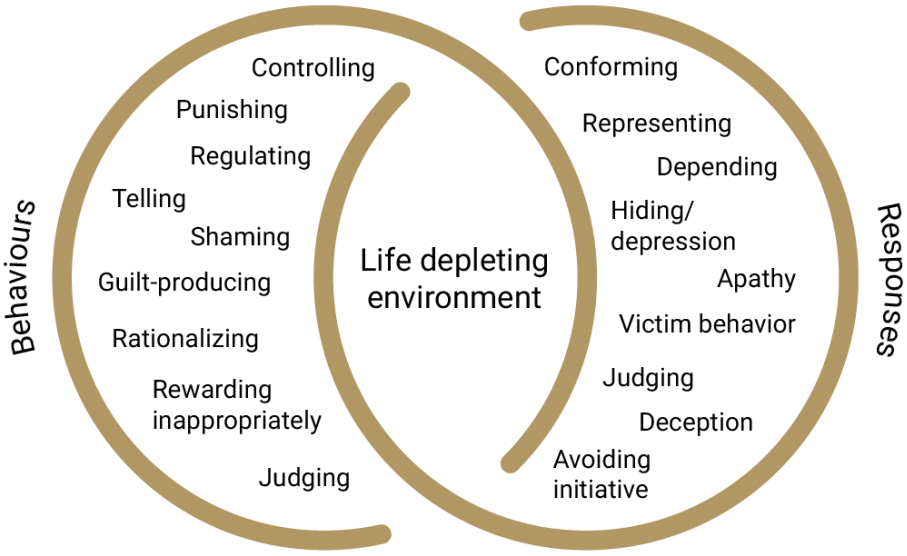
Notes:

Meeting culture

The non-intrusive role of the facilitator, and the role of the sponsor(s) and any formal leaders beyond the sponsors as equal participants is further explained when understanding the meeting culture that is being created.

The facilitator creates a life nourishing meeting culture, avoiding the creation of a life depleting meeting culture.

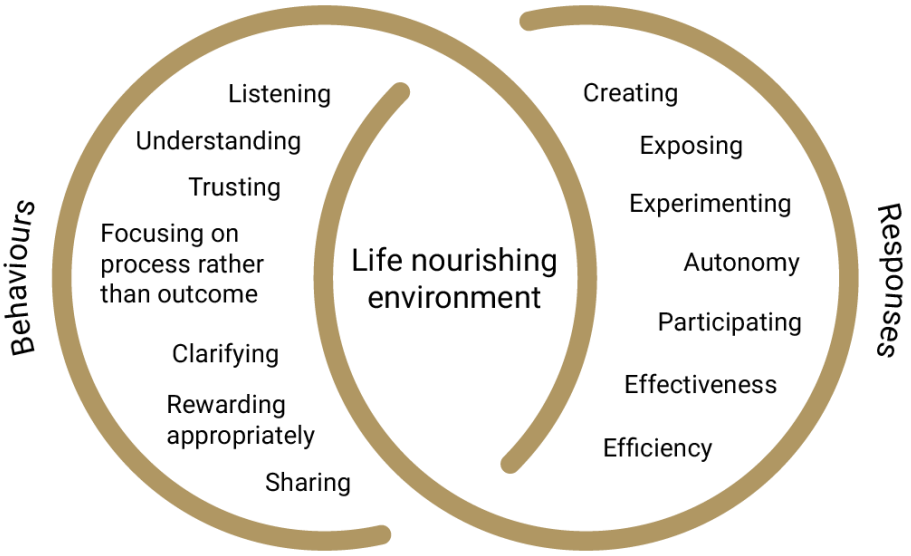
Life depleting environment



People will react in the following ways and then some if they work in a life depleting environment: conforming but with anger or helplessness underneath, resenting, depending, avoiding initiative, hiding of the true self and depression which is anger turned inwards, apathy and depression, and deception. A life depleting environment is created by the following behaviors: controlling, punishing, regulating, telling, shaming, guilt producing, judging, and being arbitrary. In a defensive environment, people react by behaviors that they feel 'protect' them.

When the people are in the mode of 'protection', they are not able to grow and expand. Is the environment within which you are facilitating the meeting a defensive environment or an accepting environment?

Life nourishing environment



What is wanted is the life nourishing meeting culture. People will react in the following ways and then some if they are in a life nurturing environment: experimenting, creating, exposing, working with autonomy, participating, and producing. A life nurturing environment is created by the following behaviors: listening, understanding, trusting, sharing, clarifying, and rewarding appropriately.

During your exploration about the life nourishing environment with the sponsor, you both will understand if this is wanted by the sponsor. The life nourishing environment helps establish the meeting culture for this meeting, and sometimes the sponsor chooses to use what is now known about meeting culture for all meetings in the organization for the benefit of the organization.

Notes:

Givens

Throughout the planning meeting, you will be working at gaining clarity about the ‘givens’ that create the container of what is ‘non-negotiable’ around the meeting. This step in the planning meeting will assist you in ensuring that you have clarity about the standard categories of givens for the meeting. Givens provide a boundary, defining what the meeting is for and what it is not for in relation to what will happen with the outputs. The givens are not meant to confine the people and their conversations. Rather, they create the expectation zone regarding what outputs of the meeting can be considered for further action.

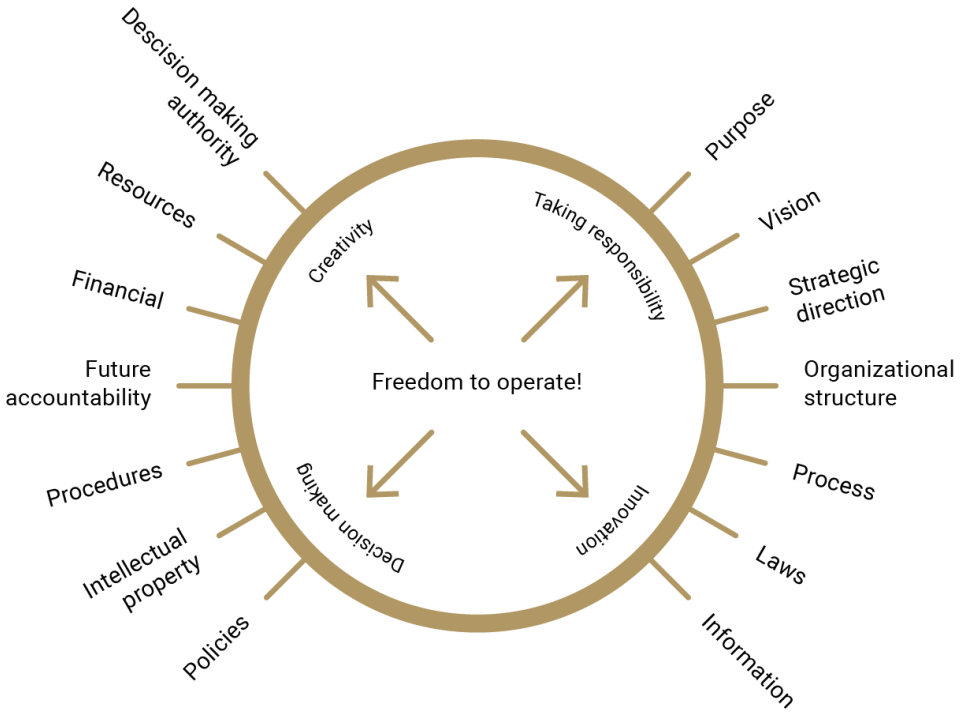
People do amazing work within this expectation zone when it is made clear to them. They better understand the space that is created, the space for creative thinking, innovation, solutions, collaborations. When they understand what is not negotiable, simultaneously this defines the space that is open. Sometimes the space is very small, sometimes it is quite big, and of course everything in between. This gives definition to the expectation zone. What is vital and non-negotiable.

Clarifying the givens clarifies the expectation zone. Within this expectation zone, the participants in a meeting have the experience of maximum choice, maximum freedom.

Maximum choice, maximum freedom is a principle of the Genuine Contact Way of working. What this means to us is that we work to clarify the givens, to clarify the expectation zone, to open as much space as possible in the meeting for people to do their best with what they bring of themselves, their knowledge, their creativity, their innovative approaches, their best contributions.

With the givens noted explicitly, people no longer restrict their contributions due to assumptions that the contributions aren’t wanted or aren’t possible to achieve. With the givens noted explicitly, people no longer waste energy developing solutions for what was non-negotiable and could use their energy within the zone created for their contributions.

The information about givens on the following pages is designed to explore the most common categories of givens. Depending on the meta goal and objectives and the unique characteristics of the organization sponsoring the meeting, other givens may also be explored. The key is to reduce the givens to the shortest number and to describe them in the simplest way. What givens are necessary to describe the expectation zone clearly, while not having so many that it can inadvertently appear to close the space for participation?



We offer you a look at the categories of givens that are most frequently considered:

- **Purpose**: is the purpose of the organization a given, or can it be changed? Hint: it is usually a given that the purpose is not open for change at this time. If the current purpose is a given, include it in the statement of this given so that it is clearly communicated as part of the givens.

- **Vision**: is the current vision of the organization a given, or can it be changed? Hint: It also is usually a given that the vision is not open for change at this time. If the current vision is a given, include it in the statement of this given so that it is clearly communicated as part of the givens.

- **Strategic Directions**: are the current strategic directions a given, or are they open to being changed? Hint: in a meeting, they are not usually open for change, unless the meeting is about strategic work. If the current strategic directions are a given, include them in the statement of this given so that it is clearly communicated as part of the givens.

- **Organizational Structure**: is the current organizational structure a given or is it open for change? Depending on the meta goal or objectives for the meeting, a desire and need may exist to alter the structure so that structure supports function. It may be valuable to include a reference such as a URL of the current organizational structure diagram. Add the given about organizational structure to the statement of givens, whether the given is that the existing structure is non-negotiable or open for change.

- **Process**: are existing processes non-negotiable or are they open for change? Usually, existing processes are open for change. Hint: a process is a set of steps with a start and a finish that can be mapped out. It is valuable to include a reference such as a URL to identify where the existing processes can be found. Add the given about process to the statement of givens, whether the given is that existing processes are non-negotiable or open for change.

- **Laws**: are existing laws a given or is it a given that whatever is agreed to in the meeting can lie in working to change existing laws, that the organization will advocate for change to laws? Hint: usually existing laws are a given . Add the given about laws to the statement of givens.

- **Policies**: are existing policies open for change or are they a given? Hint: policies are a documented set of rules or ideas about what should be done in particular situations. Policies are agreed to by governing bodies or decision makers in organizations. It is valuable to include a reference such as a URL to identify where current policies related to the meeting content can be found. Add the given about policies to the statement of givens, whether the given is that existing policies are non-negotiable or open for change.

- **Intellectual Property**: what is the given or non-negotiable pertaining to intellectual property? Many companies have strict givens regarding intellectual property that employees must adhere to. It is valuable to include a reference such as a URL to identify where the current guidelines for intellectual property can be found. Add the given about intellectual property to the statement of givens.

- **Procedures**: are existing procedures open for change or are they a given? Hint: a procedure is usually captured in documentation about how processes are to be carried out to achieve the end goal. Procedures can take the form of guidelines, unlike processes that take the form of steps. It is valuable to include a reference such as a URL to identify where the current procedures related to the meeting content can be found. Add the given about procedures to the statement of givens, whether the given is that existing procedures are non-negotiable or open for change.

- **Future Accountability**: what is the given regarding future accountability in relation to the outcomes of the meeting? Hint: is it a given that accountability is through a hierarchy of reporting, is it a given that a follow up meeting to report on progress will take place? Add the given about future accountability to the statement of givens.

- **Financial**: what are the givens regarding whether there are finances outside of the existing budget to support the outputs of the meeting, or does everything that people come up with need to be done within the existing budget? It is valuable to include a reference such as a URL to identify where the current budget can be found. Add the financial given to the statement of givens.

- **Resources**: what are the givens regarding the resources that can be used to carry out any actions that are formulated during the meeting? Can resources be deployed differently? Can resources be increased? Add the given about resources to the statement of givens.

- **Decision Making Authority**: who has decision making authority for the actions formulated during the meeting? Will decision-making be done by the group of people who attend the meeting, by a senior leadership team, a Board of Directors? Will the decision making be done during the meeting or after it is complete, and if so when can the decision making be expected? If the organization has a chosen decision-making model or process, it is valuable to provide a reference such as a URL to identify where the decision-making model or process can be found. Add the given about decision making authority to the statement of givens.

Practice with the 'Givens'. Think of a recent meeting you attended. Go through the categories of givens one by one, giving thought to what the meeting sponsor would likely state as a given in that category for the meeting. Formulate the given succinctly so that it can be easily communicated and understood.

Notes:

Returning to method

We now turn back to the Service Delivery Model and fill out the section for method. With all the information developed during the work with the tools to explore the meeting through different lenses, it should be possible to have clarity on the:

- goal or purpose of the meeting
- teaching and activity objectives
- length of time the meeting is likely to take be it two hours or a few days
- commitment to a participatory method for the meeting

The conclusion might be that the meeting requires more than a few hours to accomplish the goal and all the objectives. The sponsor may say that the meeting needs to be restricted to two to three hours and wonders how this dilemma can be handled. You can recommend that a single meeting can take place in a number of segments of two to three hours on different days, with each segment of the meeting even a week or a month apart.

If the meeting takes place over several segments over time, Whole Person Process Facilitation is used as the platform or operating system to tie all the segments cohesively into many segments of a singular meeting.

Once all this is determined, the Service Delivery Model for the meeting is completed, with agreement on the method. Another meeting needs to be organized to sort out the logistics. Usually, the person(s) that make up the sponsor team, and the right person to discuss logistics with, are different people.

Notes:

Once the meeting is complete, sit quietly with that original version of the Medicine Wheel Tool to ensure that your thoughts about readiness feel complete. Do you now have answers to those original questions? Are the answers identical to, similar to, or different than when you first imagined the organization and the answers when you approached the readiness of the organization on your own in the first steps of this segment?

Notes:

Logistics

Beginning during the planning meeting, equipped with the clarity that you gained together with the sponsor, meeting logistics can now be attended to. In the following pages, we provide you with samples of logistics checklists for what you may wish to ensure is addressed leading up to the meeting.

The lists provided are a starting point and will need to be customized based on what you know about the meeting you facilitate. They are designed for a longer meeting with many participants. Some of the items on the list might surprise you. All of the items have been added by Genuine Contact facilitators based on lived experiences.

The logistics are handled by the sponsor and their logistics person/team, with input and guidance from the facilitator. It is helpful to have an orientation meeting with the logistics person/team to review what is needed and much of the detail work can be handled asynchronously after that.

For an in-person meeting, on the day before the meeting, or the morning of the meeting depending on the venue restrictions, the logistics person should be available to finalize the set-up of the meeting room with you. For an online meeting, it is helpful to have a meeting with the logistics person to review the meeting design and ensure the virtual space is prepared.

You will want to ensure that there is enough logistics support during the meeting. This can range from 1 person from the sponsoring or logistics team who is your go-to for a meeting that is a few hours or has a small number of participants, to a team of 3-5 people for a multi-day meeting or one that has 30 or more participants.

The logistics checklists include considerations for:

- **Planning Meeting**: after completing the planning meeting process, these are the details that can already be addressed.
- **Storytelling Session**: depending on the method chosen, a storytelling session may be held in advance of the main meeting. These are the considerations for this storytelling session, some of which can be combined with the logistics for the WPPF meeting and some of which are special considerations.
- **Whole Person Process Meeting**: logistics considerations for the main meeting, including preparatory materials for the participants.
- **Debrief Meeting**: this meeting happens shortly after the WPPF meeting, sometimes within a few hours and sometimes within a few days. It typically happens with the sponsor and sometimes with the formal leader or other leaders depending on the purpose of the meeting.
- **Follow Up Meeting**: this meeting happens at an appropriate length of time after the WPPF meeting and typically includes all of the participants of the WPPF meeting or at least those who were responsible for implementing its outputs.

Logistics addressed in Planning Meeting		
Item	**Yes/No**	**Notes**
Right theme		
Right givens		
Right length for the meeting		
Multiple locations or one, need to accommodate shift workers		
Story telling evening before the big meeting to assist with grief (if applicable)		
Plans for a debrief meeting		
Plans for facilitator to be involved in guiding implementation		
Plans for a follow up meeting for progress update		
Specific liaison person to work with who has the authority to make decisions		
Determination of how the formal leader will be involved in the planning i.e., possibly in resource allocation and setting the givens		
Plans for documentation and distribution		
Guest list - Determination of who will attend the meeting, number of participants, list of participants.		
Invitations, what is to be included in the invitation? How will people know what WPPF is? How will the theme and givens be communicated? What other information is to go to the guests to prepare them for the meeting? Briefing notes/data/reports.		
Will the meeting be conducted in person or online?		
Communications plan for the event		

Logistics Considerations for All In Person Meetings		
Description	**Responsibility Taken By**	**Date for Completion**
Travel and accommodation for participants		
Any social events surrounding the meeting (e.g., reception the evening before a multi-day meeting, dinner after a full-day meeting, etc.)		
Restrooms near the plenary room with consideration for gender neutral facilities.		
If indoors, to have ventilation and multiple doors, as well as to have no obvious spraying of pesticides.		
One or two handheld portable microphones in plenary room		
Considerations for inclusion and belonging: language/translation/sign language interpreter, literacy, mobility, invisible disabilities, dietary diversity, needs, and preferences.		
Disability access for the plenary room and all breakouts.		
Audio visual aids, with special care to be taken for visual aids for those who are visually impaired or illiterate.		
Smoking area		
Access to venue at least 2 hours before meeting or longer if the venue does not pre-arrange the seating.		
1 banquet table at the side of the room with a power outlet nearby. Power strip and surge protector available.		

Logistics Considerations for All Online Meetings		
Description	**Responsibility Taken By**	**Date for Completion**
Meeting platform for audio/video that allows the facilitator to be assigned the meeting host, can create breakout rooms that allow the participants choose breakouts and return to the main room on their own, and is an accessible platform for the intended participants (e.g., something that is commonly used and not blocked by a company firewall).		
Meeting platform for collaborative work and note taking that allows participants to work creatively with color, shapes, stickers, and imported images, and can work with pages in both the plenary and breakout rooms, seeing each other's breakout work. The platform should be accessible for intended participants (e.g., web-based or a commonly used software in the organization, and not blocked by a company firewall)		
Technical support person available during sessions?		
Meeting platform links provided to participants in invitation or in communications plan?		
Is a pre-meeting tech check-in session needed (valuable for community events or other activities where participants are not regularly using the meeting platform apps)?		
Will any meeting supplies need to be sent to participants ahead of the meeting? How will these be distributed?		
Considerations for inclusion and belonging: language/translation/sign language interpreter, literacy, invisible disabilities		
Audio visual aids, with special care to be taken for visual aids for those who are visually impaired, colour blind, or illiterate.		

Logistics for Storytelling Session		
Description	**Responsibility Taken By**	**Date for Completion**
Venue		
Plenary (main) room that is able to accommodate the estimated number of guests with seating in a circle with space between each chair and no table or pillars in the middle. No breakout rooms needed. Setting should be informal and comfortable. For community meetings, an area for children to play with childminding.		
Refreshments		
Nutritious refreshments (drinks and snacks) to be available throughout the time.		
Water with glasses.		
Equipment/Supplies		
3 packages (500 sheets each) of printer paper: 1 each – blue, green, and yellow		
2 rolls low-tack masking tape (like painter's tape)		
Magic markers (non-toxic, unscented). 24 for plenary room, 5 per break out room – darker colors only (no yellow)		

Logistics for Whole Person Process Meeting		
Description	**Responsibility Taken By**	**Date for Completion**
Venue		
Registration table outside the plenary room or immediately inside and visible upon entering.		
Plenary room that is able to accommodate: • Estimated number of guests with seating in a circle and no table in the middle. There should be about 3 feet around the outside of the circle between the circle and the wall. If the group is large, concentric circles may be needed. Aisle ways for people to access their seats and amenities (e.g., opening to welcome people into the circle from the main door, towards the beverage station or restrooms) • At least 1 large blank wall for that can be taped onto to post outputs from the meeting. Other blank wall space for hanging 4-5 posters. Other considerations: • What is the noise level outside of the room? • Will it be necessary to have the refreshments in the plenary room? What can be arranged to minimize the noise of setting them up and taking them down?		
Breakout spaces either out of doors, indoors in public areas if the space is quiet and accessible, or breakout rooms (10 per 100 people), chairs in each room, in a circle with no table.		
Equipment/Supplies		
Flip chart paper. Approx 5 sheets per person.		
2 rolls low-tack masking tape (painter's tape)		
Magic markers (non-toxic, unscented). 24 for plenary room, 5 per break out room		
Table of craft supplies in the plenary room for people to take into their sessions if they wish e.g., paints, yarn, colorful stickers, pipe cleaners, construction paper, etc.		

Logistics for Whole Person Process Meeting		
Description	**Responsibility Taken By**	**Date for Completion**
Supplies for registration table: pens, paper, name tags, sign in sheet with names, contact information, signature column for agreement for contact information to be in the documentation, and agreement to be photographed and to have photos used including online.		
Sticky dots for voting		
Posters for walls (digital versions supplied by facilitator)		
Meals and Refreshments		
Water and glasses in plenary and breakout rooms		
Nutritious refreshments including tea, herbal tea, coffee, juice, and chocolate available first thing in the morning and throughout the day in or near the plenary room.		
Main meals outside of plenary room if possible. Main meals to be buffet style with several lines for speedy mealtimes.		
Dietary diversity, needs, and preferences considered		
Meeting Documentation		
Who will receive documentation? How will it be distributed?		

Logistics for Debrief Meeting		
Description	**Responsibility Taken By**	**Date for Completion**
Timing – should be as soon as possible after the WPPF meeting concludes. When will it be held?		
Venue is able to accommodate the estimated number of guests with seating in a circle with space between each chair and no table in the middle.		
Refreshments – drinks and snacks available.		
Who should attend and how will they be notified?		

Note: Based on the outcomes of the main meeting, consideration will need to be given to any documentation, equipment, and working materials (i.e., markers, flipchart paper, etc.) that may be required for the debrief meeting.

Logistics for Follow Up Meeting		
Description	**Responsibility Taken By**	**Date for Completion**
Timing – should be organized based on the expected time for implementation of the outputs of the WPPF meeting, generally within 7-90 days of the meeting. Timing should be for when implementation is expected to be well underway, but not necessarily complete. When will it be held?		
Venue is able to accommodate the estimated number of guests with seating in a circle with space between each chair and no table in the middle.		
Refreshments – drinks and snacks available.		
Who should attend and how will they be notified?		

Note: Based on the outcomes of the main meeting and the intentions for the follow-up meeting, consideration will need to be given to any documentation, equipment, and working materials (i.e., microphones, markers, flipchart paper, etc.) may be required for the follow-up meeting.

Learning summary

You have gone through many activities to understanding the value of readiness for yourself and the organization in facilitating a WPPF meeting As we come to a close of the readiness turn of the evolutionary spiral, you are invited to review your notes, reflections, and insights and to do a brief and clear summary of what your learning produced that you feel is important to remember or refer to. What did you find useful? Do you feel that you have enough insight into readiness…your own and the organization?

Notes:

3. Engagement

Maximum choice, maximum freedom provides the conditions for curiosity and wonder.
~ Birgitt Williams

In this turn of the evolutionary spiral, you will have the opportunity to explore engagement. We will introduce two aspects of the human that need to be considered when contemplating engagement.

You will have the opportunity to work out a plan for engaging yourself in the meeting, engaging the sponsor(s), and engaging the people in the organization.

Aspects of the human being

Work has been done to help the sponsor team in readiness for the meeting. We still need to do more work so that they and the people in their organization feel engaged with the meeting. It is helpful for you, as the facilitator, to do some work so that you also feel engaged.

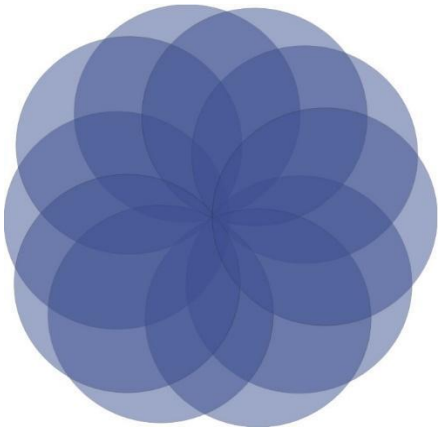
To start, we offer two aspects of the human that need to be considered when contemplating engagement.

LOLO Principle

When our minds lock onto something, they lock out other things. We call this lock-on/lock-off phenomenon the LOLO Principle. This filtering mechanism is thought to be controlled by the reticular activating system in the brain to prevent us from being overloaded. With all of the stimulation in our world – noises, visuals, sensations on and in our bodies, etc. - there is way too much for a person to notice without this reticular activating system doing its job. It chooses which stimuli to let into our conscious awareness and what to ignore.

When people focus on beliefs, they lock out things that are outside of their beliefs. Some people, who make a practice of noticing, expand their minds to broaden the canvas of things that they lock onto. Others have a much smaller canvas. Each is certain that what they lock onto is reality.

As a facilitator, attend to your own filters and be aware that all participants in the room are viewing the situation from filters of their own. Another way to say this is to check your prejudices, where you have prejudged others without giving a chance for real genuine contact. Be as aware as you can be of what you have locked out because of what you have locked onto.



This diagram is intended to be like lenses in front of the clear view of the camera. The more lenses in one place, the less clear and the more opaque the view. Yet, the person believes that they have a clear view.

Attending to the likelihood people are grieving

We always work with the belief that whenever a group of people is gathered, all the people in the group are grieving about something. Grieving is a natural human process for healing.

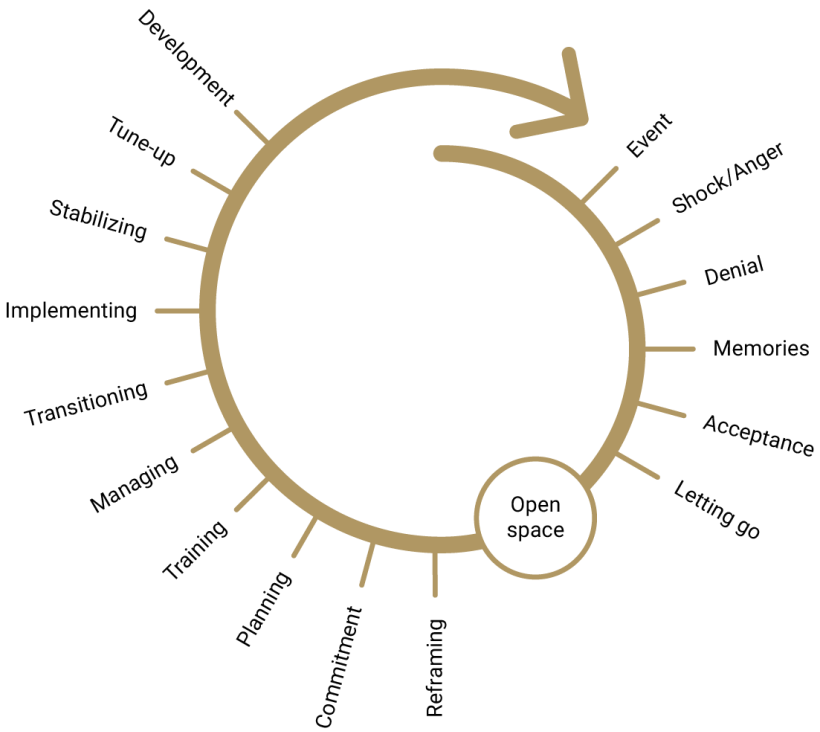
They can be grieving about different situations in their lives that are not related to the gathering. They can also be at different stages of grieving over the same situation, possibly a situation that is related to the gathering. Different people stay at different stages of grief for differing periods of time. Sometimes people get stuck in a particular stage.

The condition of the human being in relationship to their grieving impacts the condition of the organism regarding full participation in any meeting, particularly a meeting about the future.

The work of grief

We have found over time that when adults appear resistant to change, are seeming reluctant to learn, or when a meeting gets bogged down, it is usually because the story hasn't been attended to and someone or many someones in the room can't let go of the past and the present to move forward with what needs to be done in the future. It is easy to assume that this is because of resistance to change and resistance to learning. Or maybe we are witnessing grieving.

The most thorough work on grief cycle work was done by Elisabeth Kübler-Ross and grief work in organizations by Amir Levy and Uri Merry. This diagram outlines the cycle of organizational transformation, adapted from the work of Levy and Merry.



Reframing and moving to the desired new behavior and patterns in a way that is sustainable depends on the work of grief/healing. Working with grief work is a way to move the organization forward. Going through grief work is a natural way of healing for all humans. However, there are interventions that are known in the alternative healing movement to assist with getting people unstuck within their grief work so that they can move on. This usually involves work with energy and energy flow.

Anthropologist and corporate consultant Angeles Arrien has studied and written about healing practices that are universal, as found in all Indigenous Peoples around the world. Some of her work is captured in her book, The Four Fold Way: Walking the Paths of the Warrior, Teacher, Healer, and Visionary. Her research tells of many techniques for unblocking energy and addictions (strongly blocked energy) including working with rattles, drums, bells, and click sticks as well as standing, sitting, walking, and lying meditation.

The role of storytelling to assist with the work of grief

If the meeting to be process facilitated is about the future and the time with the participants is for more than a few hours, it is important to look at the past and present before adults are able to be present to problem solving about the future. It may be wise to ensure a story telling meeting the evening before.

People grieve what they are leaving behind. A teacher/facilitator/leader needs to recognize that at every given moment, people in a group are in different stages of grief-work about something. We can do nothing to reduce the grief or to hurry a person through grief-work. We can, however, assist them with navigating their grief-work by giving them the opportunity to tell the stories of what is important to them from the past and present. An exercise to get at the story gives the teacher/facilitator/leader data as well as ensuring that there is an honoring of the past and the present for the person before moving on to look at the future, be it new learning, the development of strategic directions, conflict resolution, product development, church renewal, preferred future, etc.

This fits into working with the grief cycle, which is one segment of the cycle of organizational transformation, by enabling those who are ready to do the work of memories. It also provides an opportunity for the past and present of the group to be acknowledged for their importance. This is part of assisting people to be engaged in moving forward.

Bringing attention to the cycle of grief at work

It is helpful for the sponsor to understand that grief work is part of everyday life and that different people in the organization are at different stages of grief about different situations to do with work and to do with their personal lives.

Any meeting about the future, even if filled with good solutions, will usually initiate new grief work. The closing circle may be positive but grief at work may be evident the next day. Note that unfortunately, this is often misunderstood as resistance to change.

What are your insights, ah-has, oh-nos, or points of curiosity about the aspects of the human being presented here? What considerations do you want to bring into your facilitation practice?

Notes:

With all that you learned through discernment, readiness and what we have presented so far in engagement, you are invited to make plans for engagement.

Work out a plan for engaging yourself in the meeting, engaging the sponsor(s), and engaging the people in the organization.

Notes:

Learning summary

You have gone through many activities to understand the value of engagement for yourself and the organization in facilitating a WPPF meeting. As we complete the engagement turn of the evolutionary spiral, you are invited to review your notes, reflections, and insights and to do a brief and clear summary of what your learning produced that you feel is important to remember or refer to.

Notes:

4. Construction

All organizations are learning organizations. They are either learning life depleting patterns and behaviors or they are learning life nourishing patterns and behaviors. Be assured that they are learning. ~ Birgitt Williams

Construction: You will have the opportunity to make use of everything that you learned in the Discernment, Readiness and Engagement phases as you get yourself oriented to designing a meeting using Whole Person Process Facilitation. You will be walked through an exploration of cooperative meeting components that make up a Whole Person Process Facilitated meeting then onwards to practicing a design of a Whole Person Process Facilitated meeting. Following this exploration and practice, you will have your turn to design a meeting that you can imagine using fairly soon after learning this module.

Cooperative meeting components

There are three categories of cooperative meeting components that you need to take into consideration in your meeting or workshop design work:

- WPPF as a Platform or Operating System
- WPPF as a process or method supported by the form of WPPF
- The meeting culture of WPPF

Whole Person Process Facilitation as a platform

We begin with Whole Person Process Facilitation as a Platform or Operating System. Think of the operating system of your devices. Each creates a platform to use many and many different kinds of apps. WPPF is also a platform to use for many and many different kinds of applications.

The WPPF platform is created via a variety of dimensions. Think of building the platform as adding several layers in the invisible realm of what you do as a facilitator of WPPF. The layers include:

- Working with Multiple Intelligences
- Applying Principles of Adult Learning
- Four Fold Way (Four Fold Way)
- Four Principles of Open Space Technology
- Five Beliefs of the Genuine Contact way of working
- Focus on wholeness as our natural state from which humans are always experiencing and learning
- Invitational, including the invitation to bring other tools and methods onto the WPPF platform

Working with multiple intelligences

Human beings are incredibly wise, incredibly knowledgeable, and have far greater potential than is ever tapped into or used. We tend to pay too much attention to only that which our conscious mind is aware of. Interestingly, most of what goes on in us is not in the conscious mind but in what has meaning for us, what we are emotional about, the subconscious, intuition, and how we physically connect with our world, in other words, within our whole being. We have multiple intelligences.

Whole Person Process Facilitation creates the conditions for us to become aware of our multiple intelligences, and to practice using them. In other words, we use more of the whole person that we are. In facilitating WPPF, we work beyond the five senses and what is commonly thought of as intelligence. We work with multiple intelligences.

There are many theories and concepts of human learning potential. Among them, one that has a lot of attention is the theory of multiple intelligences developed by Howard Gardner, PhD., the John H. and Elisabeth A. Hobbs Research Professor of Cognition and Education at the Harvard Graduate School of Education. Gardner's early work in psychology and later in human cognition and human potential led to his development of the initial six intelligences. Today there are nine accepted intelligences and others are being researched with a view to expanding this list.

As a facilitator of WPPF, you don't need to find a way to facilitate to make the most of multiple intelligences on your own. WPPF was designed to create the conditions for multiple intelligences to be used. One way that this is done is to create maximum freedom and maximum choice within the meeting, with the facilitator always being aware in any decisions they make, not to get in the way of freedom and choice, if at all possible, throughout the meeting.

It is helpful to think about, and possibly research more about multiple intelligences. It helps the facilitator to make sense of why the WPPF platform/operating system and the meeting culture are so important. And the way the activities within the process of WPPF are carried out.

Gardner's list includes:

1. **Verbal-linguistic intelligence** (well developed verbal skills and sensitivity to the sounds, meanings and rhythms of words)
2. **Logical-mathematical intelligence** (ability to think conceptually and abstractly, and capacity to discern logical and numerical patters)
3. **Spatial-visual intelligence** (capacity to think in images and pictures to visualize accurately and abstractly)
4. **Bodily-kinesthetic intelligence** (ability to control one's body movements and to handle objects skillfully)
5. **Musical intelligence** (ability to produce and appreciate rhythm, pitch, and timber)
6. **Interpersonal intelligence** (capacity to detect and respond appropriately to moods, motivations, and desires of others)
7. **Intrapersonal intelligence** (capacity to be self-aware and in tune with inner feelings, values, beliefs and thinking processes)
8. **Naturalist intelligence** (ability to recognize and categorize plants, animals, and other objects in nature
9. **Existential intelligence** (sensitivity and capacity to tackle deep questions about human existence such as, "What is the meaning of life? Why do we die? How did we get here?"

What are your thoughts about tapping into the greater potential of people when you facilitate in ways that gives them an opportunity to use their multiple intelligences?

Notes:

Applying principles of adult learning

In Whole Person Process Facilitation, we apply principles of adult learning. Adult learning is basically self-directed learning and differs from teacher-directed learning. Teacher directed learning is the basis for learning in children, also called pedagogy. Typically, adults don't do well with teacher directed learning.

Adult learning, also called andragogy, addresses many different needs than the way that children learn. The distinction is important in a facilitation operating system, like WPPF. We focus on learning within this platform because learning is an essential part of any meeting or workshop, including learning as a key ingredient to getting work done well.

While there is much research and definition around the difference between pedagogy and andragogy, this table provides an overview of some differences that are particularly relevant to WPPF as a platform.

Aspect	**Pedagogy**	**Andragogy**
Preparing Learners	No or minimal preparation	Preparation for participation, guidance in developing realistic expectations, and the opportunity to begin thinking about content.
Environment	The environment is formal and authority oriented, competitive, and judgmental	The environment is Informal, mutually respectful, consensual, collaborative, supportive
Planning	Planning by teacher	Planning by participative decision making
Diagnosis of Needs	Done primarily by teacher	Developed primarily by mutual assessment
Setting Goals	Setting goals is done primarily by teacher	Setting goals is done primarily by mutual negotiation
Designing a Learning Plan	Content units, course syllabus, logical sequence	Learning projects, learning content sequenced in terms of readiness

In WPPF, the platform for learning pays attention to adult learning through all these aspects, focusing on using andragogy rather than pedagogy for optimal learning.

The platform, or operating system, of Whole Person Process Facilitation supports adult learning. It supports preparing people for their experience in a workshop or meeting. It develops an

environment conducive for learning, because when facilitating a workshop or a meeting, learning is essential in both.

WPPF supports:

- a mechanism for mutual planning and for diagnosing the needs for learning
- program objectives are formulated to satisfy these needs
- a pattern of learning experiences is designed; the learning experiences are conducted with suitable process and materials
- the learning outcomes are evaluated with the opportunity to re-diagnose learning needs
- a process model of facilitation

It is important to note that the focus on learning is also about the learning that happens in meetings in organizations. Learning is necessary for people to be engaged, for work to be done well, and for good decision-making.

Note your thoughts about the emphasis in Whole Person Process Facilitation on meeting the needs of adult learners.

Notes:

Four Fold Way

The Four Fold Way comes from the work of Dr. Angeles Arrien. If you're not yet familiar with the Four Fold Way, you can read about it in the book the Four Fold Way: Walking the Paths of the Warrior, Teacher, Healer, and Visionary.

The Four Fold Way includes 4 principles, each based on an archetype is:

1. Show up, or choose to be present.
2. Tell the truth without blame or judgement.
3. Pay attention to what has heart and meaning.
4. Be open to outcome, not attached to outcome.

The Four Fold Way becomes part of the operating system or platform. Working with these principles as a facilitator and inviting participants to work with the Four Fold Way supports the development of a life nourishing environment. It supports people to develop their leadership as they practice showing up in this way. It supports the development of a participatory meeting culture where people are engaged with the topic and with each other.

Consider how the Four Fold Way can be a part of the learning platform.

Notes:

Four Principles of Open Space Technology

The Four Principles of Open Space Technology come from Harrison Owen's book Open Space Technology: A User's Guide and were first used within the participatory meeting method Open Space Technology.

The Four Principles are:

1. Whoever comes are the right people.
2. Whatever happens is the only thing that could have.
3. Whenever it starts is the right time.
4. When it is over, it is over.

The Four Principles become part of the WPPF operating system or platform. Working with these principles as a facilitator and inviting participants to work with the Four Principles supports the development of a life nourishing environment. It supports people to be detached from what is happening while simultaneously using their leadership to contribute fully. The four principles invite people to be comfortable with what is happening and when it happens. They also invite people to speak from their hearts, so that when the meeting is over, they are content with whatever happened and can move forward without regret. In this way, it supports the development of a participatory meeting culture where people are engaged with the topic and with each other.

Consider how the Four Principles of Open Space Technology can be a part of the learning platform.

Notes:

Five Beliefs of the Genuine Contact way of working

When we participate in an organization as a member or as an employee, we put energy into orienting ourselves to the reality of the organization, to the truth of what it is. We do this for the purpose of finding our way, navigating, figuring out where and how to make our contributions.

In creating the Genuine Contact way of working and the Genuine Contact program, Birgitt Williams and Ward Williams took the time to clarify their beliefs. They, and all authorized Trainers and GC Professionals, are very explicit with the beliefs that our work is based on. People who work with us don't need to adopt all these beliefs, we don't need to understand what they are in exactly the same ways as each other, and we don't need to work with them in identical ways. Our job is to be explicit about the beliefs so that the people who work with us can decide if this is sufficiently congruent or at least interesting to work with us.

The Five Beliefs of the Genuine Contact way of working are:

1. Every organism has within it the blueprint for its own optimal health and balance.
2. Focusing on Genuine Contact enables individuals and organizations to achieve the health and balance that is needed for optimal effectiveness.
3. Spirit or Conscious Energy is all that is.
4. Change, with its accompanying loss, grief work, and conflict is constant.
5. Simple frameworks and processes enable success with complex situations.

The Five Beliefs of the Genuine Contact way of working become key in the Whole Person Process Facilitation operating system or platform.

Consider how the Five Beliefs can be a part of the learning platform.

Notes:

Focus on wholeness as our natural state from which humans are always experiencing and learning

Focusing on wholeness as our natural state from which humans are always experiencing and learning is a mindset, an attitude, a belief on the part of the facilitator and is likely a part of what attracted you to Whole Person Process Facilitation. This belief is another invisible layer in the WPPF platform.

This belief can be broken down into 2 parts. First, believing in wholeness as the natural human state. That each person is whole, with no need to grow, change, or develop in order to be considered whole. We can each make the choice to grow, change, or develop throughout our lifetimes. But we are whole people on every day of that lifetime.

Second, that from this natural state, humans are always experiencing and learning. We are continually taking in our experiences, day by day, moment by moment. And we are processing those experiences and learning from them, whether we are conscious of and intentional about this learning or not.

WPPF was developed with this belief as one of the layers of its platform. Whether or not a facilitator also holds this belief can impact the results experienced in a WPPF meeting.

Reflect about the importance of the mindset of the facilitator of Whole Person Process Facilitation. Reflect about your mindset regarding thinking of humans as whole, with nothing needing to be fixed.

Notes:

Invitational including the invitation to bring other tools and methods into the WPPF platform

Inviting other tools and methods

Once you understand the role of Whole Person Process Facilitation as an operating system or platform, it is easy to understand that other tools and methods can be used in this coherent and supportive platform. Facilitators and leaders who use Whole Person Process Facilitation usually have a lot that they have learned about various facilitation tools and methods. Sometimes favorite ones that work for them emerge. Our invitation is to hang on to them and use them in the WPPF platform. The platform invites various applications.

Inviting people

It is important to invite people to participate in a Whole Person Process Facilitation meeting or workshop and to be invitational to all activities along the way. Being invitational requires a true belief that you are inviting the person, feeling okay if the person either accepts or rejects the invitation. Being invitational takes practice until doing so becomes natural.

How would you assist a sponsor of a meeting to understand and accept that the people are being invited to a meeting rather than told to come? And further, that during the process you remain invitational, and people have a choice to make along the way as to whether invitations are accepted or rejected?

Notes:

As you work with Whole Person Process Facilitation as a platform, you are likely to understand the components that make up the platform, adding components that are not covered here. Note your reflections about Whole Person Process Facilitation as a platform or operating system.

Notes:

Whole Person Process Facilitation as a process

We will now look at the other role of Whole Person Process Facilitation. The process follows a form. As a facilitator works through this form, it gives visible shape to a WPPF meeting. A participant can recognize the process based on these predictable components.

The components of the form include:

- The circle
- Goal, objectives, and givens
- Transfer in
- Hopes and fears
- Facilitating content
- Closing circle

In this section on WPPF as a Process, you are invited to learn more about what the form is. How to work with this form is further described in the Meeting Design section.

Circle

To improve communication and the sense of community, the chairs are set up in a circle, with some space between them. The people, sitting in a circle, with no tables as barriers to communication, are an archetypal form for people experiencing community. WPPF doesn't work around a table or in auditorium style seating.

Whether you have experience working with a circle configuration or not, you are invited to imagine sitting in a circle with your participants. How comfortable are you? What feels different than facilitating from the front of the room? What do you need to do to prepare yourself and the participants for a meeting that involves sitting in a circle?

Notes:

Goal, objectives, and givens

Offering clarity about what the meeting or workshop is about via a meta-goal, objectives, and the givens that define the expectation zone. The meta-goal is the high-level purpose that the meeting or workshop is intending to accomplish. The objectives are the key points that must be accomplished in order to achieve the meta-goal. The givens are the non-negotiables that exist both for what will happen in the meeting and what will happen with the outputs of the meeting. These givens define the expectation zone – what participants understand they can do and cannot do while achieving the meta-goal and objectives. The goal, objectives, and givens are communicated in the invitation to the meeting or workshop and during the beginning of the session.

What do you believe are the benefits of offering participants a clear goal, objectives, and givens, if any? How is this different than developing and communicating an agenda for the meeting?

Notes:

Transfer in

Inviting the whole person into the meeting via an activity called Transfer In at the start of the meeting. Do not mistake this as an ice breaker or check-in. Much more is going on. The whole brain is engaged as are multiple intelligences of a person. A key is its invitational nature, allowing the space for the person to bring their whole person into the meeting or workshop to the extent that feels comfortable for them.

Recall times when you have been to meetings that started with an ice breaker or check-in. Recall times when you have been invited to participate in a Transfer In. What do you notice about the difference between the two experiences? What emotions do you recall? How did each experience feel in your body? What do you believe are the benefits of inviting people to bring their whole selves into the meeting, to the extent that feels comfortable?

Notes:

Hopes and fears

Although emotions were invited in during the Transfer In as part of inviting in the whole person, the second activity in a WPPF meeting is specific about inviting in emotions, normalizing the inclusion of emotions in the meeting. The activity is asking about and giving the opportunity to give voice to Hopes and Fears.

On occasion, a client will ask that this be changed to asking for accomplishments and struggles, rather than hopes and fears. What do you notice about the difference between these 2 phrases: accomplishments and struggles OR hopes and fears? How can you imagine participants may experience giving voice to these 2 things differently? What is the benefit of intentionally inviting emotions through voicing hopes and fears?

Notes:

Facilitating content

There are several components to facilitating the content after the transfer in and hopes and fears:

- accessing the story pertaining to the content
- focus on andragogy by using the four learning styles of learning through feelings, watching, thinking, and doing and meeting the needs of all learners with as good of a mix as you can achieve
- bringing the whole brain into the room, right and left and exercising the transfer between the two.
- working with the energy of the people in the room and trying to keep energy high by how you sequence, where and how people are sitting, mixes of singles or groups of 2, 3, or 4, or whole group including mixes of how to have group flow from one to the other. The buildup of energy created with every exercise also attends to individual energy, then combining energy with one other, and then combining energy back together again as a group.
- reflection circles to deepen learning
- bridging seamlessly between different content exercises.
- varying the levels the facilitator works on – in front of group, with group, apart from group.
- timing

Facilitating content is done using a combination of all these components, within an activity flow that is designed by the facilitator to meet the goal and objectives in advance of the meeting.

What do you understand about the importance of facilitating content within the WPPF form?

Notes:

Closing circle

Finishing out the meeting or workshop with a closing circle in which people have the opportunity to say anything that they want to say with a request that they include something that felt important to them that they learned. In a multi-day meeting, a closing reflection circle is held to finish out each segment of the meeting in a similar fashion.

What do you believe is the benefit of including a closing circle within the form of WPPF?

Notes:

Note your reflections about the form of Whole Person Process Facilitation that provides a structure for the process.

Notes:

Meeting Culture of Whole Person Process Facilitation

The last of the co-operative components to consider is the meeting culture. This is the 3rd strand, in addition to Whole Person Process Facilitation as a platform and process. All these cooperative components interact with one another to make up the fullness of Whole Person Process Facilitation.

How does the meeting culture get created? As you begin working with Whole Person Process Facilitation, focus on creating it through working with:

- The Five Beliefs of Genuine Contact
- The Four Fold Way
- The Four Principles of Open Space Technology

Review what you know about the Five Beliefs of Genuine Contact, the Four Fold Way, and the Four Principles of Open Space Technology, paying attention to how the three of them combined help to define the meeting culture.

From your perspective what, if anything, is the advantage of a consciously developed meeting culture for the meeting or workshop?

Notes:

Meeting design components

A Whole Person Process Facilitation meeting is designed taking into consideration WPPF as a platform, process, and meeting culture. The design is developed in a way that is intended to achieve the meta goal and objectives, while respecting the givens.

Based on the form of a WPPF meeting, here are ways that the components of the form can be facilitated.

Welcome

Once the participants have gathered and taken a seat in the collective circle, the meeting opens with a warm welcome. This welcome is typically done by the meeting sponsor or formal leader and followed by the facilitator. The welcome sets the tone for the meeting and provides a framework for the session. As the facilitator, you work with the sponsor ahead of time to ensure the key points are included:

The sponsor (in 5 minutes or less):

- Appreciates people for participating in the meeting
- Shares a very brief introduction including relevant points of the story leading up to the meeting, the meta-goal, and the givens
- Introduces the facilitator and hands the meeting over to them.

The facilitator: (in 5 minutes or less):

- Appreciates the people for participating in the meeting
- Acknowledges the wisdom that is in the circle
- Reiterates the meta-goal of the meeting.
- Gets the transfer in underway as quickly as possible

By the end of the welcome, participants should have been provided with a clear framework and an early sense of belonging in the meeting.

Transfer in

After the welcome, each meeting begins with a transfer in.

Total time: 30 minutes to one hour, depending on size of group.

Below, there are a series of samples of Transfer In exercises to pick and choose from. The basic formula in all the exercises is:

1. Asking participants to choose an item in a way that invokes the use of intuition. Creating the opportunity to engage right hemisphere directed thinking, and to engage intuitive intelligence.
2. Asking participants to follow a rational thought pattern to determine what information the item is assisting them in processing. Creating the opportunity to engage left hemisphere directed thinking in conjunction with right hemisphere directed thinking.
3. Sharing their reflections, to the extent that they care to (no pressure) with a partner, creating the opportunity to develop and strengthen productive use of voice and creating the opportunity to develop and strengthen listening skills. Sharing with a partner happens in any group of 2 or more participants.
4. Saying something regarding the partner's reflections, to the group as a whole. If the group is over 20 people, have them do their sharing in a number of different circles, for example if there are 120 people in the meeting or workshop, there would be six circles of people, usually standing, always with their partner with them, sharing into the circle. Each circle does not need the presence of a facilitator. Creating the opportunity to use both voice and listening skills productively in a group setting and simultaneously to demonstrate these leadership skills. The invitation to introduce one's partner is made by passing the input object around the circle, not putting the input object into the center.
5. (Optional) Capturing the key comments from the sharing in notes that can be used later in the organization in whatever context that is right for the purpose of the learning organization.

A key to launching a meeting successfully with the transfer in is to follow the order and to masterfully choose items and the accompanying reflective question so that participants already engage with the topic at hand for the meeting. For example, the ½ day meeting might be about finance. The items used might be some kind of photographs. The question might be "what does this item convey to you about the finance department here?". Thus, all key components of the transfer in are achieved, and the group is already 'on topic' for the meeting.

In multi-day meetings, the transfer in on subsequent days does not follow the formula above but is simpler.

The facilitator places an object used to 'manage' conversation into the center of the room. Chairs must be far enough away from the center to require participants to stand up and walk to the center

to reach the object. Walking to the center again promotes development of an aspect of leadership, standing up for what you believe in. Participants are invited to say whatever they wish until the energy for the transfer in is complete. An added component to this, depending on what the facilitator is masterfully working to achieve, is to open the transfer in time with a well thought out, leading question. Participants are invited to say anything that they wish and to also answer the question. For example, "it is now time to reflect about anything at all that you wish, including your reflections from your learning about the finance department in yesterday's segment of our meeting. I also ask that you say whatever you care to say about your learning from the homework you were assigned for last evening." This creates enough space for any reflections at all to be aired, while simultaneously aligning the group to the purpose of the meeting by drawing their attention specifically to their learning from the meeting so far.

Transfer In Examples

The following samples are suggestions. You can create other activities for the transfer in. The question you ask is critical and takes consideration to get right for the greatest benefit of the people and the meeting. Keep them simple. The samples can also be adapted for use in online meetings.

Transfer In Sample: Genuine Contact Leadership Development Cards

If you are in an onsite meeting or workshop, bring Genuine Contact Leadership Development cards. Lay them out face down in a circle on the floor in the center of their sitting circle. Laying the cards face down is an important choice in inviting intuitive choice of the object. If you are in an online meeting, use the free online version of the cards. Ask people to choose a card. You are invoking their intuition.

Then, give them a question that you have carefully thought out, yet beginning with "what does this card convey to you about…" For example, if the workshop is about Individual Health and Balance, your question would be "what does this card convey to you about health and balance?", using the question to also set in motion thoughts about the content of the workshop or meeting. The choice of question should set in motion thoughts about content without going too deeply into either thinking about the topic or feeling the emotions of the topic.

Ask them to sit in silence for a couple of minutes for reflection, during which time they may wish to take notes. At the end of the two minutes of silence, invite them to find a partner and meet in pairs to discuss their cards, and only as much of their reflections as they feel comfortable in sharing. This portion of the activity is usually given ten minutes, on occasion fifteen. Before going off into the conversation in pairs, the instruction is given that "in ten minutes when you return to the circle (or circles) you will be asked to introduce your partner by saying their name and sharing some of the insights that they have shared with you". It is possible to add to the instruction to share only two or three of the highlights if you have a large group and want to save time.

When people come back from sharing in pairs, if the group is up to 20 people, you as the facilitator are part of the group and you have the input object. You note to the group that whoever has the object is the speaker and the rest of us are respectful listeners. Then you let the group know you are passing the object to the person on your left and that person will pass it on until everyone has spoken and the object has gone all the way around. When it comes back to you, you have an opportunity to say a thank you and something about the contributions that helps to bridge to the next step of the meeting.

Some facilitators take notes as people are speaking of some of the highlights and when the object comes around to them again, as well as a thank you they read the notes that they took. The transparency of reading these notes aloud is important when they are taken.

If the group is larger than 20 people, staying in one group makes this activity take too long and people get bored. In this instance, have them meet in more than one circle. This usually has people standing in a circle and depending on the number of circles you want to create so that the groups are smaller, you might have somewhere between 10 and 20 people in each circle. No facilitator needs to be in the circles; however, each circle needs to have an input object. The circles need to be far enough apart to minimize the noise from one to the other. When the groups are done, they come back to sit in the main circle with you and you can say your thank you and some words about the process.

Optional: once the transfer in activity has been done, an option is to have a reflection circle to give the opportunity to share any insights from the transfer in activity. Again, it is possible for the facilitator to take notes during this reflection circle. If so, be sure to read the notes aloud or take them on flipchart paper that participants can read.

Variations

The Leadership Development cards are one object that can be used for the Transfer In. Many other objects can also be used. Here are some common suggestions:

- Colorful magic markers, pencil crayons, or crayons on the floor in the center of the circle. You may wish to put them onto a piece of fabric to define the space where the objects are placed to help keep them in a central area.
- Photos, cartoons or greeting card covers or quotations on the floor in a circle, fanned out around the center.
- Have participants wander around the building you are in, inside or outside, and bring back an object that appeals to them. Then to come back and return to the circle with the object.
- Invite participants to bring an object from home that they feel is connected to the theme of the meeting. In this case, be sure to have the meeting sponsor select extra objects to have available in the center of the circle for those who forgot.
- Ask people to think of an animal. Any animal, just the first that comes to mind.
- Ask people to think of a color. Any color, just the first that comes to mind.

- Place a collection of objects from nature in the center of the circle, spread out in a single layer.
- Ask people to look at their hands and reflect on what the card is conveying to them about who they are, where they've been, what they've done or something similar. This transfer in object should be suitable to the meeting goal and objectives.

Transfer In Sample: Choosing Three Cards

This is a different variation of the Transfer In with the Genuine Contact Leadership Development cards. This time you are asking them to choose three cards, keeping track of the order in which they were chosen. If using the online deck, they can copy and paste the cards to see all three at the same time. Ask the people to assign the first card the position of 'past', the second card the position of 'present' and the third card the position of 'future'. Then follow the procedure described above, however give a minimum of fifteen minutes for the sharing. Your question will be "what do these cards of past, present and future convey to you about….?"

Notes:

Hopes and fears

Total time: 30 to 45 minutes

The next step in a WPPF meeting is to determine what the objectives of the group members are, in having come together. The hopes and fears activity is different from "brainstorming and flipcharting" objectives. Asking about hopes and fears addresses the emotional intelligence of what is really going on in the people and what their objectives are based on that emotional intelligence.

Ask people to break into groups of no more than 6 (sometimes no more than 4 if the total group is small) and take about 15-20 minutes to have a conversation about their hopes and fears for the meeting, the workshop or for a related theme such as hopes and fears for applying the learning. Based on what was learned in the planning, the facilitator works out the right best theme for the hopes and fears.

The hopes and fears are recorded with the anticipation of presenting them to the rest of the whole group. One way to record the hopes and fears is on flip chart paper. This is efficient for presentation. However, it is limiting to use flip chart paper if you want to be able to theme or otherwise map hopes and fears. In this case, use A4 or Letter sized paper with a request of recording one hope or one fear per page. If facilitating the meeting online, an app with whiteboards and break out spaces is needed, with people reporting back sharing their whiteboards. Set up the whiteboards in a way that each hope or fear is an individual object, so that they can more easily be copied, moved, or otherwise manipulated when theming or otherwise mapping hopes and fears.

When the small groups come back to the main group, they present their hopes and fears. The facilitator has choices in how to have these presentations take place. They might be someone from a group reading the hopes and fears to the group. Or, if the hopes and fears are on singular sheets of paper, using either a wall or the floor for placing the hopes and fears on, they could be grouped into themes as they are presented, allowing the group themes to emerge based on what is offered. Once you have more experience as a facilitator, it is possible to use other mapping tools to group hopes and fears. Start simply. Presentations usually take about 10 minutes, maximum 15 minutes. This is not an activity for discussion as it is one of presentation and listening.

Next, ask the group to do the best that they can to help each other realize the hopes that have been expressed and that you will do your best as the facilitator to do the same. You will also invite people to speak up if the fears are coming into reality so that the group can pause together and figure out what can be done.

The hopes and fears are placed somewhere so that they can be referred to through the process by the participants. Promise that they will be brought forward at the end of the meeting or workshop as part of the evaluation. You will need to remember to do that at the end of your process. When your process extends over several meetings over a period of weeks/months, it is wise to look at these hopes and fears together from time to time as a check to see how people are doing.

Optional: once the hopes and fears activity has been done, an option is to have a reflection circle to give the opportunity to share any insights from the hopes and fears activity. It is possible, but not required, to ask participants to take notes of these reflections so that they are recorded as part of the meeting documentation.

Notes:

Outline of the day

Sharing the outline of the day is best done after the Transfer In and Hopes & Fears are completed, with acknowledgement that the outline will be adjusted slightly based on what was shared in the Hopes and Fears.

In WPPF, we advise not to share too detailed of an agenda with participants. People are often satisfied if they receive a list of the meta-goal and objectives for the meeting or workshop, and that their break times are given specifically.

A sponsor may prefer that a more thorough agenda be predetermined and sent out in the announcement of the meeting or is being announced at the meeting based on their existing meeting culture. You may want to limit the agenda to identifying when you are planning to work on which of the objectives based on large blocks of time. Because this is the time in which you adjust the facilitation design to some degree after receiving information about hopes and fears, giving more time to some things, less time to others, you don't want to commit to too specific an agenda.

Notes:

Facilitating learning of the content

There are several components to facilitating the content after the transfer in and hopes and fears:

- accessing the story pertaining to the content
- focus on andragogy by using the four learning styles of learning through feelings, watching, thinking, and doing and meeting the needs of all learners with as good of a mix as you can achieve
- bringing the whole brain into the room, right and left and exercising the transfer between the two.
- working with the energy of the people in the room and trying to keep energy high by how you sequence, where and how people are sitting, mixes of singles or groupings in 2's, 3's, 4's, or whole group including mixes of how to have group flow from one to the other. The buildup of energy created with every exercise also attends to individual energy, then combining energy with one other, and then combining energy back together again as a group.
- reflection circles to deepen learning
- bridging seamlessly between different content exercises.
- varying the levels the facilitator works on – in front of group, with group, apart from group.
- timing

Each of these is explored in some detail below to assist you in learning how Whole Person Process Facilitation involves the facilitation of content.

Accessing the story pertaining to content

In this learning module, we teach the technique of using storytelling, story sharing, and story listening as a simple means of unblocking stuck energy and assisting with the work of grief.

Storytelling prior to the process facilitated meeting

If the meeting to be Process Facilitated is about the future, it may be wise to ensure a story telling meeting the evening before or build storytelling near the start of your meeting. This fits into working with the grief cycle by enabling those who are ready to do the work of memories. It also provides an opportunity for the past and present of the group to be acknowledged for their importance. This is part of assisting people to be in readiness to move forward.

Bringing attention to the cycle of grief at work

It is helpful for the sponsor to understand that grief work is part of everyday life and that different people in the organization are at different stages of grief about different situations to do with work and to do with their personal lives.

Any meeting about the future, even if filled with good solutions, will usually initiate new grief work. The closing circle may be positive but grief at work may be evident Monday morning. Note that unfortunately, this is often misunderstood as resistance to change.

Storytelling

We provide two samples of conducting a storytelling activity.

Short time frame

There are a number of ways to process the telling of stories. One way is the exercise below on glads/sads/mads. This one gives the opportunity to tell stories with the concept that not all stories are happy ones but that there is also room for sads and mads.

Glads/Sads/Mads or Accomplishments/Struggles
Total Time: 40 minutes minimum

Use this exercise as a way of getting the stories of the past and present to be shared. Best used near the beginning of a facilitation or in a storytelling session. People are invited to work in groups of 2, 3, or 4 and write down their glads/sads/mads on A4 or Letter sized paper, one per page, for sharing with the larger group later.

If you don't like glads/sads/mads, another option is “accomplishments and struggles”. It will take the group to basically the same place, although glads, sads, and mads invites emotion more so than accomplishments and struggles.

In introducing the exercise, normalize that there will be that which we are happy about and that which we are not and that this is all part of our story, and it is important for us to know our story, no matter what it holds. Considering what you know about participants, it may be important to briefly highlight that “mad” stories are the stories that made one feel angry, rather than the British slang of “mad” meaning extremely silly or stupid.

Twenty minutes for small groups to share stories with each other, writing one story headline down per page, noting whether it is a glad, sad, or mad story. It can be helpful to give the small groups 3 colors of paper, with an agreed upon color code like “yellow for glad, blue for sad, green for mad.”

When they return to the collective circle, twenty minutes for sharing by reading the story headlines and placing them on the floor in the center of the circle. And then ask if there are any other stories to be told that have not been captured. At this point it is helpful to identify the common "themes" from the stories, if any. The reason for one item per paper is to make it easy to manipulate the pages into groupings such as thematic groupings.

If the group is large such as a group of 100 people, have the breakout groups larger, with six to eight people per group. One person does the note taking, and one person does the presenting on behalf of the group when the small groups return to the main circle.

Full evening – less than 100 people

Total time: 3 hours

Storytelling is best done in a time frame that is not rushed, allowing a whole evening for a group of up to 100 people. Format for seating is a circle. Use a transfer in exercise to get the stories stimulated. This also “brings the whole person” into the room. As per the transfer in, about ten minutes are required at the beginning for one-to-one sharing. The rest of the storytelling time is done as a whole group.

As the facilitator, you provide an object (e.g.: a stone), that you identify as the input object that is held by the speaker and that all who are not holding the object are respectful listeners. Make it safe to tell stories that are happy, sad, mad. All have their place. And note that stories will continue until they are all done. As facilitator, pick up the object again at the end, asking if there are still more stories to be told before declaring that the storytelling is completed.

Whenever you work with stories, story-sharing, storytelling, you are working with the healing work of the grief cycle.

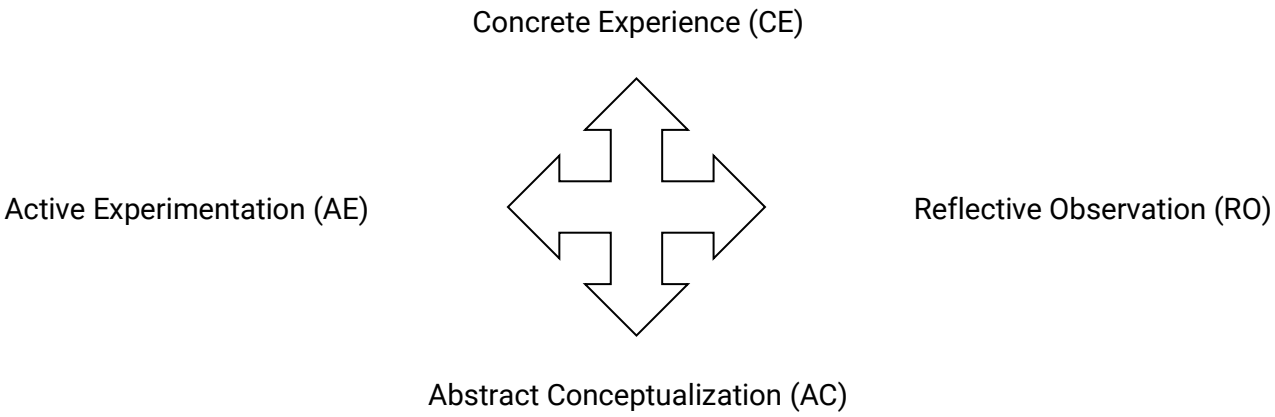
Please make notes of your reflections about attending to grief work as a way to assist people to be able to look to the future, and the organization to move forward.

Notes:

Meeting learning needs

One way that we ensure that all learning styles are catered to within a WPPF meeting is by designing our facilitation plans using the early (1984) work of David Kolb's Learning Style Inventory. The Kolb Learning Style Inventory is based experiential Learning Theory (ELT) and draws on the work of prominent 20th century scholars who gave experience a central role in their theories of human learning and development. Kolb cites the work of John Dewey, Kurt Lewin, Jean Piaget, Lev Vygotsky, William James, Carl Jung, Paulo Freire, Carl Rogers and Mary Parker Follett and their work to develop a holistic model of the experiential learning process and a multi-dimensional model of adult development.

Over the years, David Kolb and others in the space of adult learning and development added to the theories and models. More recent theories and models are worth looking at for self-education. However, they don't assist in the design and development of a facilitation plan, keeping it simple, in quite the way that the early Learning Style Inventory does. And so, we design our WPPF meetings and workshops to cater to the learning style needs of those who learn best when their feelings are engaged, when they have the opportunity to watch and reflect, to think, and to do.



- Concrete Experience (CE) learns by feeling/experiencing (e.g., a chance to discuss with a partner)
- Reflective Observation (RO) learns by watching (e.g., a chance to have silence for personal note making)
- Abstract Conceptualization (AC) learns by thinking (e.g., a chance to read the theories and have a lecture)
- Active Experimentation (AE) learns by doing (e.g., a chance to role play or put the learning into practice)

Addressing learning style needs within Whole Person Process Facilitation

One of the reasons that Whole Person Process Facilitation works so well is that we address each of the four learning styles above as often as we can to ensure that everyone has their best opportunity

to learn during the meeting. We focused on the Learning Style Inventory work because it has been our experience that when all four learning styles (CE, RO, AC, AE) are attended to during a meeting, each person in the room had the opportunity to be engaged for maximum learning for at least some of the time. This makes a big, big difference in the levels of creativity and problem solving in the meeting. Usually, business is taken care of more efficiently and effectively, and high learning has taken place that is productive beyond the meeting.

Even though we don't address every learning style for every subject we are going through, learning throughout the meeting takes place within people of all learning styles because at different times, each learning style need is catered to.

We also encourage the facilitator to pay attention to their preferred learning style, because most facilitators tend to facilitate to their own preference and miss the learning needs of others, assuming their audience will also learn well within the facilitator's preferred learning style.

For example, what is the likely preferred learning style of a facilitator of 'ropes courses' for team building? How could a 'ropes course' be facilitated in a way that meets all four learning styles? Within Whole Person Process Facilitation, a ropes course for team building exercise can generate so much more sustainable learning for all who participate. Think about this simple facilitation of a ropes course using the four learning styles as you go through the following pages in which examples are given of what kinds of activities are appreciated by people in the different learning styles. Notice that some of the activities are appreciated by more than one style.

Learning through feeling

Concrete Experience learns best through feelings – “from my experience, this is what I feel about...” In context of the learning environment, activities need to be created to allow for feelings to be engaged and expressed. Our research with people who learn best through their feelings created the following list that we find helpful as we imagine ourselves as learning best through our feelings.

- Attention to the need to heal, feel cared for, nourished, allowing the 'need to be needed'
- Allowing (letting thoughts flow without judgement)
- Invitation to become more courageous
- Being a respectful listener leads to the feeling of being accepted, allows the participant to share openly, and feeling capable of contributing
- Being able to relax and follow my own flow in how I engage
- Believe that it’s possible to bring the whole person, that the whole person is wanted – and that visibly being the whole person creates great results.
- Conversations in the circle and breakouts allow for deeper learning of any content
- Diversity
- Facilitator is comfortable with silence - no rush to fill the silence with words
- Facilitator asks the right questions, then allows space to self-reflect, or work in pairs
- Freedom - and discovering continually that learning can arrive from anywhere when I’m in genuine contact
- Freedom in the design brings me comfort, freedom of thought, freedom to learn, discover, freedom to schedule my learning and my rhythm, freedom to take responsibility for learning
- Grounding content through the stories that individuals relate and that the facilitator shares
- Intention leading to outcome through drawing and other visual creations
- invite reflecting on feelings, allowing feelings
- A reflective space. Slow down. Being present
- Keeping it simple - a simple design creates powerful results
- Listening in the circle helps with learning
- Keep us curious about ourselves, our learning and development and about others
- Practicing - facilitate a meeting and through understanding more deeply become more courageous through giving myself proof that it works
- Following the Four Fold Way
- Reflection question is related to the purpose of the design - Power of the Question
- Respectful of differences
- Rich and diverse answers from folks because everybody gets to speak
- Inclusion of all people and their sharing
- The freedom of the design brings me comfort in that I can ‘be’ here as I am, connect to content as I am and from where I am.
- Transfer-in builds trust
- Opportunities to be in genuine contact with myself, with others, and with the whole group

Learning through watching

Reflective Observation (RO) learns best through opportunities to watch and to reflect. The reflective observer may not be able to get into reflective mode in the meeting itself so may do reflection afterwards based on watching and observing during the meeting or workshop.

The need is more at an individual level of learning, following own pace to absorb, individual silent reflection, and opportunity to watch others.

- Allow time for reflection, without being rushed
- Be in conversations with those of the “beginners mind” to see things anew
- Behaviour & attitude of the facilitator must be one of respectful listening. Allowing (letting thoughts flow without judgement)
- Being in genuine contact with self- opportunity to notice self
- Breakouts help to process the content
- Conversations in the whole circle especially when presented as a reflection circle
- Diversity
- Watching videos offered for a workshop to immerse myself and allow new reflections as I did this at my own pace
- Facilitator is comfortable with silence - no rush to fill it with words
- Facilitator plays a key role in this too- being in genuine contact with self, while providing space, since a lot of learning is happening through watching them
- Freedom - learning can arrive from anywhere when I’m in genuine contact
- Freedom to take responsibility for learning
- Grounding of content is through the stories individuals shared related to the content
- Having a study buddy and facilitation with questions
- Learn as a watcher, like a 'fly on the wall'
- Individual reflection time.
- Slow down. Being present.
- Learning content is also about relaxation being able to relax and follow my own flow in how I engage
- Listening in the circle helps with learning
- Making notes for myself
- Not having to speak
- Facilitator not reacting to any answers since it may convey preferences and people may refrain from sharing
- Opportunity to share in a group and listen to what is being shared
- Reflection question is related to the purpose of the design - Power of the Question
- Returning to thoughts through my own experiences and musings by others
- Rich and diverse answers from folks because everyone gets a chance to speak
- Self-study is helpful for this learning style, and more space to circle back with self
- Time to structure myself, engage, explore

Learning through thinking

Abstract Conceptualization (AC) learn best through thinking and like to know that there is reading, like data, reference to theories, books, and additional references post-meeting.

- Need a container focus by offering concepts and information about a basic meeting format
- Need for theories, facts/ research-based articles that allow for this learning style to think, absorb, validate, question, seek more information; will seek actual proof, want to understand the purpose/ 'why'
- Breakouts help to process content
- Conversations
- Diversity
- facilitation with questions
- Freedom to take responsibility for learning
- Grounding of content is through the stories individuals shared related to the content
- Hearing presentations activates my thinking process, which continues for as long as I keep focus, I can also re-activate a learning journey by returning to thoughts through my own experiences and musings by others.
- Helpful to be in conversations with those who have beginner's mind
- It gives time to process the information and have deductions, everyone's learnings from the same information may be different.
- Lay out structure of the day/meeting
- Letting thoughts flow without judgement
- Listening to different perspectives of other participants
- Listening to how the facilitator highlights perspectives, give me lots of food for thought
- Listening to presentations made by others
- meaning of bringing whole person. & what's the impact?
- Need is to understand at a deeper level, to build conviction
- People are different today than what they were in the last meeting - keeps us curious about others - keeps relationships fresh, not taking others for granted, shows respect.
- Reading
- Reflection question is related to the purpose of the design - Power of the Question
- Reflection time
- Rich and diverse answers from folks because everybody gets to speak.
- Setting the intention to learn
- The learning hub, videos are well thought out and inclusive
- The time allotted for activities - removes barrier, freedom of thought (also in doing)
- Time to structure myself, engage, explore
- Use of hard copy/PP as part of the WPPF concrete examples
- What is the meaning of bringing whole person. & what's the impact?
- Working with different GC tools wherein the concept of the tool is understood, and then also applied to demonstrate outcome/ result will be helpful

Learning through doing

Active Experimentation (AE) learn best when they take what has been gone over in workshop or meeting and go out and apply their learning in world.

- Active participation is a need- so break-outs, simulation, physical exercises, small group interactions, frequent breaks (with some meaningful tasks/ group discussions) will help in learning
- Breakouts help to process the content
- Conversations in the circle and breakouts allow for deeper learning of any content.
- Diversity
- Experiencing in the course that this is what we need
- Experiencing organizational change via meetings
- Facilitating the meeting or a portion of the meeting
- Freedom - and discovering continually that learning can arrive from anywhere when I'm in genuine contact
- freedom to move around, walk around, go outdoors, not be stuck to laptop during learning
- Freedom to schedule my learning, my rhythm
- Freedom to take responsibility for learning
- Games that require some problem to be solved in small groups will be helpful; energizers will also help in keeping the energy going
- Grounding of content is through the stories individuals shared related to the content
- Having a study buddy and facilitation with questions
- Helpful to be in conversations with those of the "beginners mind" to see things anew
- Keeping it simple
- Learning content is also about relaxation being able to relax and follow my own flow in how I engage
- Learning materials offered in different modalities i.e., artistic; auditory; visual
- Noticing activity while taking a walk is helpful
- Peer learning by small group activities
- Practicing what I am learning
- Prototype something
- Reflection question is related to the purpose of the design - Power of the Question
- Self experiencing
- Study buddy

You've had the opportunity to go through preferences within each of four learning styles. At the start, you were given a request to go through this information while thinking about how you would design the simple facilitation of learning using a ropes course using the four learning styles. Ropes courses are usually offered to teams of people as part of a trust building activity.

We invite you to create a design using the four learning styles.

Notes:

Notes:

Engage the whole brain to engage the whole person

Business and developed country societies have been dominated by left hemisphere directed thinking and attitudes. Right hemisphere directed thinking and attitudes have been viewed as ‘soft’ and not necessary in the world of successful business. Yet, current and future business success is going to be deeply influenced by strengthening right hemisphere directed thinking. Let us remember that we're whole brained people and we must develop skillfulness again in engaging the right hemisphere, the left hemisphere, and the connection between the two.

The right hemisphere of the brain is seen to be intuitive and non-rational, the left side rational and logical.

Facilitating right hemisphere learning

1. Uses emotions/intuition/creativity.
2. Remembers faces.
3. Responds to demonstrated or illustrated instructions.
4. Experiments randomly and with less restraint.
5. Prefers problem solving by looking at the whole, approaching the problem through patterns, using hunches.
6. Makes subjective judgment. Looks at sameness.
7. Fluid and spontaneous.
8. Prefers elusive, uncertain information.
9. Synthesizes
10. Images/pictures - in thinking and remembering.
11. Prefers drawing and manipulating objectives.
12. Prefers open-ended questions.
13. Prefers work or studies open-ended.
14. Prefers participative authority structures.
15. Freer with feelings.
16. Responds best to kinetic stimuli.
17. Good at interpreting body language.
18. Uses metaphors and analogies.
19. Favors intuitive problem solving.
20. Deals in wholes/relationship
21. Thinks simultaneously/holistically
22. Characterized as feminine.
23. Is free of restriction of time.

Right hemisphere activities lead us in metaphoric learning; we are required to make relationships and our ability to do deep learning gets enhanced. Visualization and imagery help us to get at the truths we didn't know we knew. Right brain activities open us to the deep parts of ourselves and expands our consciousness. It enables us to know what we didn't know we knew in a very short time.

Some principles you might keep in mind when you are facilitating right hemisphere learning:

1. Relaxation is of primary importance. A good way to help people free themselves of mental and physical stress is to enable them to be in touch with their own breathing patterns. Have them breathe in life, energy…Breathe out all their negativity, tensions…
2. Try to remove all external distractions so that their concentration can be focused. If there is noise outside of the room, call their attention to it. Then guide them to let the distraction go.
3. When facilitating right brain learning, do it in a way that people are relieved of having to do it "the right way." There is no right way, no wrong way. So many people are afraid of right brain learning. Try to eliminate this fear. Approach it from a stated perspective that the wisdom that each person needs is right inside of them, and the wisdom a group of people needs is always present in the room.
4. Have the people try to turn off their thinking, their rational patterns of thought. Encourage them to simply let the experience flow. Avoid too many instructions. And don't start out by explaining all the reasons for why you are doing what you are doing. Just do it!
5. Keep in mind that the right brain learning is more about being than doing.
6. Remember that right brain learning is enhanced when the facilitator is "at home" in this mode of learning. When you are relaxed and also enter into the experience it becomes richer for everyone.

Facilitating left hemisphere learning

1. Intellectual.
2. Remembers names.
3. Responds to verbal instructions and explanations.
4. Experiments systematically and with control.
5. Prefers problem solving by breaking into parts, approaching problem sequentially, using logic—uses logic, reasoning.
6. Deals in parts/specifics.
7. Reductionist thinking. Will analyze, break apart.
8. Is restricted by time.
9. Makes objective judgments. Looks at otherness.
10. Planned and structured.
11. Prefers established, certain information.
12. Analytic reader.
13. Language - in thinking and remembering.
14. Prefers talking and writing.
15. Prefers multiple choice tests.
16. Prefers studies/work carefully planned.
17. Prefers ranked (hierarchical) structures.
18. Controls feelings.
19. Responds best to auditory, visual stimuli.
20. Not facile in interpreting body language.
21. Rarely uses metaphors and analogies.
22. Favors logical problem solving.
23. Is characterized as masculine.

Some principles you might keep in mind when you are facilitating left hemisphere learning:

1. Provide opportunities to solve problems, creating the space for participants to decide for themselves how they wish to tackle the problem solving.
2. Provide instructions and material both auditorily and visually.
3. Create opportunities for participants' objective judgments to have a forum for expression.
4. Provide an agenda or outline or workbook to provide reassurance that the meeting has been planned and has structure.
5. Provide references to information that is related to the meeting or workshop content that participants can research on their own.

The organ that connects the two hemispheres is the corpus callosum. Instances when the corpus callosum has been severed or parts of the brain damaged have revealed much about how we learn and how we express our learning, the use and function of the left hemisphere, the use and function of the right hemisphere, and the function and possibilities when we use the whole brain, switching easily between the two sides. Strengthening the corpus callosum is an important part of whole brain learning.

Please make notes about your reflections regarding whole brain learning and the implications that the need for whole brain learning has for facilitation. Using what you have already experienced in our learning module that is being facilitated using WPPF, please identify what you have experienced that has been done to facilitate whole brain learning.

Notes:

Attending to energy

The final item about facilitating the learning of the multi-sensory human being that we pose for you is to attend to energy. The human being is made up of complex energies, always active. We suggest you attend to keeping the energy flowing as much as possible for optimal learning. As well as ensuring that the learning needs, we have already drawn to your attention are attended to, attend to energy directly.

Facilitate keeping the energy high by how you sequence, where and how people are sitting, mixes of singles or groupings in 2's, 3's, 4's, or whole group including mixes of how to have group flow from one to the other. The buildup of energy created with every exercise also attends to individual energy, then combining energy with one other, and then combining energy back together again as a group. People experience that this sequencing of configurations adds to building their sense of safety with the group.

We invite you to do a simple exercise with us to experience your unseen energy field. Please choose a partner and stand facing each other. Place your hands against the hands of your partner but about four inches apart from touching each other.

Feel the energy that flows between your hands and that of your partner. Pull your hands back a bit and feel the energy. Does it weaken? Does it get stronger when your hands are only a few inches apart? How far apart can you pull your hands from that of your partner and still feel the energy?

Note your reflections about the implications of the importance of working with the energy of participants in a meeting. Using what you have already experienced in our learning module that is being facilitated using WPPF, please identify what has been done to pay attention to the energy of participants.

Notes:

Reflection circle to deepen learning

The reflection circle makes use of action/reflection learning. First there is an activity. This is followed by a reflection circle in which people share what they have noticed, what is important to them based on the activity. The reflection circle includes asking people to share their insights. They report that they have ah ha and oh no experiences and learning.

In ways known and unknown, linked to multiple intelligences, the reflection circle engages intuition. Where does intuition reside? How does one access intuition?

People experiencing their intuition describe:

1. Words come into mind.
2. There is an energy surge.
3. Beyond words.
4. Sense of the profound.
5. Mystical silence.
6. Same processes as contemplative mode.
7. Physical sensing.
8. Feeling completely me - One with one of everything.
9. Right timing.
10. "Ah-ha" experience.
11. Precognition
12. Clairvoyance

Basic Processes of Intuitive Learning include:

1. Knowing with unwavering certitude that learning will occur.
2. Trusting in one's own intuitions and in the intuitive process.
3. Remaining open to the expected, but more especially to the unexpected.
4. Being absolutely honest in action and in reflection.
5. Delineating generic boundaries for the area of learning.
6. Reflecting upon and drawing new insight from one's own experience.
7. Developing a sense of multiple realities, making the familiar unfamiliar.
8. Focusing attention on the ground rather than on the relevant figure in learning; attacking learning obliquely.
9. Embarking on a pilgrimage of learning.
10. Developing a sensitive awareness of the proper timing of processes and events.
11. Suspending or minimizing deliberate, conscious rational processes.
12. Being aware of and responding to energies outside oneself.
13. Dialoguing with the materials.
14. Allowing oneself to be led or drawn in a certain direction, surrendering to the intuitive.
15. Being aware of and following one's feelings in the learning process.
16. Being in touch with the influences and the dynamics of the unconscious.

17. Appreciating meaning in synchronicity.
18. Recognizing the gift of revelation in the learning process.

How does the reflection circle engage intuition? Which of the basic processes of intuitive learning are used?

Notes:

Bridging seamlessly

Within Whole Person Process Facilitation, a number of activities take place. The facilitator, creating the design for the meeting or workshop, as a last step in designing the facilitation plan, takes time to figure out how to smoothly bridge from one activity to the next. The facilitator looks for the connecting thread between the activities. Bridging activities and segments of learning seamlessly, in a way that feels connected, enhances the learning experience. At times, your work focuses on the mind, emotions (heart), spirit, or physical intelligences, weaving a coherence within the whole person. Bridging seamlessly maintains the coherence.

What, if anything, have you picked up about bridging seamlessly during your WPPF workshop? What do you want to pay attention to when you design and facilitate WPPF meetings?

Notes:

Varying levels in which facilitator works

This involves positioning your body in a variety of places – sometimes standing, sometimes sitting with the group, sometimes apart from the group. What is the energy shift that happens when a small group is having a discussion, and you go and stand in the doorway? In an online meeting, are you sitting upright and framed centrally in the camera? Or leaning with your hand on your chin, partway out of the frame? Are you quite close or a little distance away? Pay attention to what you are doing with your presence.

Notes:

Timing

One of the biggest mistakes that facilitators of Whole Person Process Facilitation make is to have too many activities, too many learning and activity objectives for the allotted time. They rush through the meeting. It takes experience and practice to sort out the right timing for what needs to be accomplished. If you are unsure, plan for extra time.

Notes:

Sample activities for facilitating learning of the content

We provide here some sample learning activities that you can use or adapt in a WPPF meeting for facilitating content. Using these or developing your own activities, we recommend that you keep in mind the design components that have been presented in the preceding pages:

- Engaging the whole brain to engage the whole person
- Attending to energy
- Reflection circle to deepen learning
- Bridging Seamlessly
- Varying levels in which the facilitator works
- Timing

Hands activity to look at following and leading

Content objective: assisting participants to understand who they are as leaders and what that means for them

Total time: 20 minutes

Work in pairs. Have people use their hands to mirror one another's actions. Person A to lead for 1 ½ minutes. Then change of roles so that Person B leads for 1½ minutes. No talking throughout and no talking when this is over. When this is done, each person writes down in a few minutes of silent reflection what it felt like to lead and what it felt like to follow. Then compare notes again in the same pairs for 5 minutes. Finally, to report their learnings/observations back to the group.

Animal activity to look at leadership

Content objective: assisting participants to identify characteristics of a leader

Ask people to think of an animal and write it down. Now ask them to think of an animal that for them represents a leader (or facilitator), and to write that down. Then ask them to stay in silence and to write down what it would take to transform the first animal into the second one. Basically, what you are looking for here is to see what characteristics the first animal has (usually representing the person who chose it) and what characteristics the second animal has which usually reflects for them what they need to become in order to be the leader/facilitator that they want to be. In a funny way, these animals give a great deal of information about the personal growth needed, without you having to say so; people generally realize this on their own. They then share their observations in pairs, and then can report back to the whole group only that which they wish to share. There is never any order that is required, nor any requirement to speak. Keep it safe for folks. There is no right and wrong. If you are going to use this exercise, you need to become well versed on the totem meanings of animals so that you can have this information available for the

discussion if it becomes helpful. There are two good books that I know of that can be resources- one called Animal Speak and the other called Medicine Cards.

Activity for defining the purpose of an organization, of a meeting, etc.

Content objective: group must come up with an agreed upon statement of purpose for the group

This activity supports a group to move quickly to coming up with a statement of some sort that they need to agree on.

Total Time: 30 minutes

This exercise is highly effective, taps into all sorts of great ideas, but most importantly is effective because it removes "attachment to outcome" or one person pushing their idea at the whole group. This relies on individual wisdom having a chance to express itself, and to be benefited from, and then group wisdom to express itself.

Sitting in a circle. No tables.

Each person starts with a sheet of paper. Words in quotation marks are what the facilitator says, with enough time in between for the participants to follow the instructions.

"Write one statement of purpose."

"Pass the paper to the person to your right to add a statement of purpose to that sheet of paper. This may or may not be influenced by what is already on the paper. In other words, you are also free to write the statement of purpose again, that you wrote on your original sheet of paper."

"Pass the paper again and add a statement of purpose." Do this until the paper has been passed between three and five times in total depending on the size of the group. The original person for each sheet of paper should not end up with it again.

"Pass the paper again and that person is now to circle the statement of purpose that is most important to the person now holding the sheet of paper."

These circled items are recorded on flip chart paper for all to see.

Then ask for commonalties, themes and write those words on another sheet of flip chart paper. Have the group agree on the commonalties and themes that they think are important. A way to do this is to make available red, yellow, and green hot dots (sticky dots). Have them place green dots on all themes/commonalties that are a "go". A yellow dot on all themes/commonalties that they can live with, but with caution. And a red dot for "no way". Discussion of the red dotted items is next to see what is needed for them to become green or yellow dotted items, or to see if they should be

deleted from the list. Sometimes group voting is needed here. 100% consensus voting is not usually best. An agreement that items proceed if 80% of the group says yes is better. It allows for dissenting voices not to be silenced and yet enables the group to keep moving.

And have the group collectively come up with a statement of purpose from this.

For additional samples for facilitating content, consider joining the Genuine Contact Organization as a member, participating in the online mentoring via the Genuine Contact list serve. Samples, ideas, and conversations to assist learning and application are part of the peer with peer mentoring.

Closing Circle

The final segment of the WPPF meeting is a closing circle. The facilitator starts the closing circle by inviting participants to say anything that they want to say to feel complete at the end of the meeting, with a request that they include something that felt important to them that they learned. Focusing the closing circle on learning reflections helps to avoid people falling into the pattern of simply thanking everyone for a great meeting. It draws attention to what has been learned during the time together. This can help to verify that the learning objectives were met.

Typically, the facilitator passes the object clockwise around the circle, meaning they pass it to the person on their left-hand side. It can be helpful to ask the sponsor to sit in the seat to the right of the facilitator so that they are the last person to speak in the closing circle. This gives the sponsor an opportunity to reflect back what they heard about what was learned or accomplished during the meeting and to thank the participants for their important contributions.

In a multi-day meeting, a closing reflection circle is held to finish out each segment of the meeting in a similar fashion. The prompt from the facilitator can be more specific, asking for reflections on the last activity or what was accomplished during this segment of the meeting.

Evaluation, and Feedback

It is time to think about evaluation and feedback. If a person is locked into one learning style, and you have facilitated for four learning styles to reach everyone at least some of the time, the person is not going to like parts of their learning experience, and really like other parts. If that person fills out an evaluation form at the end of the session, the question is how valuable is that evaluation to you for your improvement?

Is it not better for the person to evaluate how much they have learned? The teaching and activity objectives all relate to the learning of the person. It is possible to have an evaluation of the learning during the closing process of the meeting, before the closing, or after the closing. Our preference is, during the closing reflection circle every day of a multi-day meeting, and in the final closing circle at

the end of the meeting or workshop, to ask people in the circle to share what they learned that felt important to them. If we have facilitated a workshop, we ask for an evaluation of the workshop about a month after the end of the workshop. At that time, people had the opportunity to integrate their learning, and hopefully also apply their learning. For us, this timing of the evaluation makes more sense, and we focus on what was learned.

Sample evaluation forms are included in the additional resources. The evaluation should be designed to be useful and also part of the ongoing learning experience.

As well as evaluation near the end of a meeting or workshop, it is also helpful to have a person make personal commitments based on their learning. They could be guided to write a simple letter to themselves and place it in a sealed envelope to be opened in six months or a year.

> Dear myself,
>
> I'm going to start…
> I'm going to stop…
> I'm going to continue...
>
> Love,
> Me

What stands out for you about the closing, evaluation, and feedback?

Notes:

Meeting design – your turn

The Four Stages of Competence learning model, also known as the Conscious Competence learning model, is one you may be familiar with. It was developed in the 1960s and has been useful over time to assist someone who is learning a new skill to be patient with their learning.

The first stage in learning is unconscious incompetence (not knowing how little the person knows about the skill), on to conscious incompetence (recognizing their incompetence), then to conscious competence (consciously acquiring the new skill), and finally to unconscious competence (being able to apply the new skill effortlessly). The last stage is using the skill naturally as though it has always been part of you. A common example of these stages of learning is the process one goes through in learning to ride a bicycle. By the unconscious competence stage, the cyclist is even exclaiming about not even needing to hold the handlebars because cycling is so natural. And we have the saying "it's like learning to ride a bike" that describes the ease one feels and the confidence that they will always know how once it is learned.

Learning Whole Person Process Facilitation follows this learning model. It is important that you be very gentle with yourself as you learn, understanding that even if you are a seasoned facilitator of other meeting methods, you are now learning a new skill. You may have several skills already related to the skills you need with WPPF. This means that as you learn WPPF, different skills involved may be at different stages of development in the learning model, some even already at a high level of competence, and some at that beginning stage of not yet knowing what you don't know.

For this reason, we created a design table for designing your WPPF meeting or workshop. Until you reach that learning stage of unconsciously competent with your designs, we encourage you to work through this design table every time you use WPPF. We still use this design table after all these years, even though we are unconsciously competent. The design table helps us to think the design through and make sure that we haven't missed anything that we should be paying attention to. One of the setbacks that can happen in the unconsciously competent phase of learning is to get sloppy. When facilitators get sloppy, it is usually because they are catering to their own learning preferences rather than meeting the learning needs of the group.

The design table has three sections.

1. **Pre-work** – some people learn better if there is some preparatory work for them to do so that they can start engaging with their learning.
2. **The meeting or workshop** – the plan may be for a few hours to a few days of a single meeting at one time, or a single meeting or workshop that has multiple segments spaced out over a period of time such as weekly for several weeks or monthly for several months.
3. **Post-work**, otherwise known as homework – post-work enhances learning retention and supports application or implementation of what has been learned.

We recommend that you start with the meeting itself, leaving the pre-work and post-work design until later in your design process. The design will point to what will support learning and engagement as pre-work and what will support implementation when the meeting or workshop is over.

The first column we recommend filling in is the fourth column, the Teaching or Activity Objective. The rest of the design can be built for the purpose of accomplishing the teaching or activity objectives. With the teaching or activity objectives identified, you know what you want to accomplish. Think of the objective that you have for what you want the person to learn in this step of the meeting, and what you want them to be able to do in the future as a result of the learning. These teaching or activity objectives are linked directly to the meta-goal and objectives you identified during the planning process.

Then go to the fifth column, Method, to sort out what you will actually do to achieve the objectives. This can be a single activity, or several activities to achieve the objective. A word of warning. You'll need to be prepared, during your design work, to change these activities once you go to the columns for length of time, learning style and intelligence dimensions, and configuration/group size. When you look at the overall time and how you are meeting the needs for variation, you will always discover that modifications to the original ideas are needed. The process is one of going back and forth among these categories until you are satisfied with the final design.

After identifying the teaching or activity objectives and the method for accomplishing them, the next step is to go to the third column, Learning Style and Intelligence Dimensions. For every activity, you need to plan to create the activity in such a way that you are involving the learning of all the learning styles, all the dimensions to the extent that you can do so. At a minimum, every activity involves no less than two learning styles and two dimensions. Over the course of a few activities, you need to have included all the learning styles.

Next, go to the second column, Group Size, and figure out, for the purpose of keeping people energized throughout, whether each activity will involve doing work singly, in pairs, small groups of three, four, five, six people, the whole group on their own without the facilitator, or the whole group with the facilitator. You should have a reason why each is your choice, not just choose different group sizes for the sake of it. It is common to choose to use more than one configuration to do an activity. For example, they may work singly, then join up in small groups, and finally in the big group with the facilitator to complete an activity. Another variation is to give people choices. For example, you can ask people to work in small groups with the caveat that if anyone prefers to take some time to work on their own, to please do so.

At this point, most of the design table is filled in. You now work with column one, Time, starting with the total time that you have estimated to meet the teaching or activity objectives based on how long the steps in the method will take. Most often, the first draft of the design will take longer than the total time the meeting is supposed to be. Adjustments to each activity are now necessary to meet the time limit. One consideration could be whether or not it is possible to reduce the scope of

any of the activities, to address less learning styles or intelligence dimensions, still keeping to a minimum of 2 of each per activity. This can reduce the total time needed for each activity. You may also eliminate some activities if you realize that the teaching or activity objective can be met without it. Sometimes, you'll find you toss out the whole design and start again.

Column six is the easy one to fill out once you have figured out your design, to remind yourself of the materials you need for each step. Once the design is complete, you'll share the appropriate materials needed with the logistics person or team.

It is not uncommon to need about three hours of design work for every intended hour of the meeting or workshop when you begin working with the WPPF designing. Over time, as you develop unconscious competence, this design work becomes faster.

It is your turn now to do a practice design for a Whole Person Process Facilitation meeting. Imagine that you are the leaders of an organization, and you are holding a four-hour meeting one morning to enable your staff to understand that the organization is establishing a new culture for meetings conducted in the organization as one facet of the commitment to being an innovative organization.

You'll find a design table in the resources that accompany this workbook. As you work on the design, make notes of what you are noticing in your design process.

Notes:

Now, it is your turn to design a Whole Person Process Facilitation meeting that you can actually use in the near future. What meeting do you already know you are facilitating that would benefit from using WPPF? It might be created for a team or organization that you are familiar with, or even a church group, book club, or your family. Simply think of a group that would benefit from your help with a Whole Person Process Facilitation meeting or workshop.

Notes:

Learning summary

You have gone through many activities to understand how to design a WPPF meeting. As we complete the construction turn of the evolutionary spiral, you are invited to review your notes, reflections, and insights and to do a brief and clear summary of what your learning produced that you feel is important to remember or refer to.

Notes:

5. Implementation

People involved in the process of figuring out what needs to be implemented are committed to implementation.

~ Birgitt Williams

Implementation: in this turn of the evolutionary spiral you will have the opportunity to examine the importance of planning for implementation from the beginning of your work with the WPPF meeting; to understand that there is a difference when the facilitator has a mandate to help guide implementation or only to prepare for implementation; the benefits of a single meeting using WPPF, and the impact on the organization of frequent and regular meetings using WPPF.

Steps towards implementation

The full scope of implementation depends on a number of variables, including whether you are external or internal to the organization. Other variables include the goal of the meeting, the teaching and activity objectives, the length of time, and the givens that define the expectation zone that were considered in the design.

Planning for implementation begins at the very beginning of the Whole Person Process Facilitation process, not once the meeting is over. Steps towards implementation include:

- Planning meeting with sponsor as a WPPF meeting
- Readiness of sponsor by preparing the sponsor for the meeting
- Logistics
- Meeting design
- Meeting facilitation using WPPF
- Post meeting debrief with sponsor as a WPPF meeting

You might be the one directly responsible for implementation. Or, if you are an external consultant your assignment might end with the facilitation, and you have no oversight of implementation except to have helped the client get ready by how you do your WPPF. In either case, how can you use each of the steps toward implementation to support implementation?

Notes:

Where to implement WPPF

Whole Person Process Facilitation is useful to help leaders, families, and organizations to tackle both simple and complex topics. Create a comprehensive picture of uses of WPPF in and for an organization by topic. For example, WPPF can be used to improve customer care, create teams, and so much more. How many uses can you come up with?

Notes:

WPPF works in many kinds of organizations and groups. Rather than creating a comprehensive picture of the types of organizations and groups where Whole Person Process Facilitation can be applied, it is easier to develop a picture of the types of organizations that are not a good candidate for a WPPF meeting. What types of organizations are not good candidates for a WPPF meeting?

Notes:

Using WPPF in a polarized group

When a group of people are polarized, or otherwise in conflict with each other, having a meeting using Whole Person Process Facilitation is beneficial.

In such a meeting, you do not have the polarization or the conflict resolution as the business or development goal. Instead, during the preparatory work in the planning meeting, great consideration is taken to find a business or development goal that is important and could be unifying as people get passionate about achieving the goal.

In such a situation, an internal facilitator can have too many difficulties, in that people can make assumptions of where the facilitator is in the polarization or conflict. It is better to have an external facilitator who is perceived as neutral, and simply helping the group accomplish their business or development goal.

The preparation of the facilitator is critical to achieve neutrality, not only visibly, also in motivation and attitude. It is important to shift away from any judgmental attitude related to the people who are involved in the polarization or conflict and related to the subject matter. There will be people in the room that you could be tempted to view as 'the problem,' hence the need for self preparation so that your energy field is clear of this view, replacing it with the view of all people as precious.

What are your insights about how a Whole Person Process Facilitation meeting can assist a group of people to move beyond polarization or other conflict?

Notes:

Regular and frequent use of WPPF in an organization

For a singular WPPF meeting, benefits include yet are not limited to:

1. Accessing and benefitting from intellectual and intuitive intelligence
2. Accessing mental, physical, emotional, and spiritual intelligence
3. Accessing optimal learning through attention to all learning styles
4. To the extent possible within the authentic constraints of the organization, promoting maximum choice and maximum freedom of individuals to access and apply their potential
5. Fostering personal leadership and a meeting culture that promotes personal leadership
6. Achieving exceptional results, usually beyond what is anticipated

In organizations that make regular and frequent use of Whole Person Process Facilitation meetings, the benefits that are found in a single meeting become benefits that can be worked with on a daily basis in the organization. The entire organizational culture is affected by these benefits.

This poses both challenge and opportunity for the leadership and the organization. If the organization wants to make use of the full potential of its people, there is recognition of the opportunity provided to do so. The leadership of the organization must develop a liberating structure that allows this potential to be optimized, while at the same time learning how to work with a participatory architecture that includes clear identification of where the space is ‘closed’ (not open for input) and where the space is ‘open’ (open for innovation, creativity, decision making, and people truly feeling empowered to get their jobs done). In other words, the culture, structure, and architecture are a scaled-up replication of the culture, structure, and architecture of the WPPF meeting. Basically, the organization needs to reconfigure itself and how it works, and its culture, to make the most of the potential of the people, removing unnecessary restrictions, and providing simple and impactful supports.

What comes to mind when you think about making frequent use of meetings facilitated with WPPF in an organization?

Notes:

Learning summary

You have gone through many activities to understand the approach to implementing not just the WPPF meeting, but also creating the conditions for success in implementing its outcomes. You are invited to review your notes, reflections, and insights and to do a brief and clear summary of the value of implementation that you feel is important to remember or refer to.

Notes:

6. Monitoring & Adjustment

Monitoring and adjustment has an energy of flowing forward to the best possible future.
~ Birgitt Williams

In this turn of the evolutionary spiral, you will be asked to do some monitoring and adjustment of your learning in this module. This orients you to monitoring and adjustment as an energy of flowing forward to the best possible future. You will be oriented to two categories for the monitoring and adjustment of the meeting in the organization, one regarding the meeting using WPPF and the second regarding implementation of the outcomes of the meeting. Some examples of monitoring and adjustment are provided.

Your learning

This is the perfect time to do monitoring and adjustment in relation to what you now know about Whole Person Process Facilitation. Early in this learning module, you developed a baseline measure to capture your perceptions of Whole Person Process Facilitation. Please do not look at those original answers quite yet.

As we come to the end of learning in this module, you are invited to answer the reflection questions again. Please answer the following question on a scale of 1 to 10, where 1 is low and 10 is high.

How much do you feel that you know about Whole Person Process Facilitation?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about helping an organization get into readiness for a meeting or workshop using Whole Person Process Facilitation?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about engaging the people of an organization in a meeting or workshop using Whole Person Process Facilitation?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about constructing a design for your meeting or workshop using Whole Person Process Facilitation that leads to successful implementation?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about implementing the agreed on actions resulting from a meeting or workshop facilitated using Whole Person Process Facilitation?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about monitoring and adjusting the agreed on actions over time following a meeting or workshop facilitated using Whole Person Process Facilitation?
1 2 3 4 5 6 7 8 9 10

Having completed this monitoring activity, please now look back on your original answers in the Discernment section of this workbook on page 6. How have your responses changed from then until now?

This process of measuring against a baseline assists you in monitoring the progress of your learning. You may or may not have made gains. Regardless, this measurement tool brings your sense of progress, or lack thereof, to your awareness.

Take time to note your insights as a result of this monitoring, including notes about what you wish to adjust. Monitoring and adjustment in relation to your learning can be this simply done.

Notes:

Another process for monitoring and adjustment about your learning regarding facilitation of WPPF is to go back to the Five Beliefs of Genuine Contact. Remember that we asked you to monitor throughout your learning what the impact would be if you worked with these Five Beliefs in how you work with WPPF, and what the impact would be if you didn't work with these Five Beliefs. Hopefully you were doing that monitoring of your insights as you went through your learning in this module.

At the end of this learning module, for monitoring and adjustment purposes, we encourage you to consider the value of the Five Beliefs of Genuine Contact in your facilitation using WPPF.

Notes:

Using WPPF

Keeping simplicity in mind, there are two categories for monitoring and adjustment in the organization that has used WPPF for a meeting or workshop.

- The meeting itself
- Implementation of the results

WPPF Meeting

Monitoring is best suited to be done with the sponsor(s) of the meeting. It can happen as part of the debrief meeting or shortly thereafter.

Meeting the goal and objectives

Measurement for monitoring can be designed in relation to whether the goal and objectives for the meeting were accomplished, possibly also using a scale from 1-10 separately for the goal and each objective.

After making this assessment of the goal and objectives, the sponsor(s) would share their insights and express their considerations for adjustments in the future. Whether they would use WPPF again for a future meeting is part of their considerations.

Meeting the goal and objectives + additional considerations

Monitoring of the meeting can also be done using a questionnaire with one quantitative question and three open-ended questions. In the introduction to the questionnaire, be sure to include the meta goal, objectives, and givens of the meeting as a reminder of what you'd originally agreed together would be accomplished.

The suggested questions are:

1. On a scale of 1 to 7, with one as low and 7 as high, how would you rate the meeting for achieving the goal and objectives for the meeting.
2. Why did you rate it this way?
3. Do you have any suggestions for adjustments for future meetings?
4. Any other comments?

When the questionnaire is completed, take time to discuss their insights and gain clarity on adjustments for the future.

Whatever approach you choose for monitoring the meeting with the sponsor, you will find recommendations for seeking evaluation and feedback from the participants in the Evaluation and Feedback section of the meeting design elements on page 107. If you use this approach to participant evaluation, it can become part of this monitoring conversation with the sponsor(s).

Implementation

The second category for monitoring and adjustment focuses on the implementation of the results of the meeting or workshop. We recommend use of the questionnaire format again.

1. On a scale of 1 to 7, with one as low and 7 as high, how would you rate implementation of the results of the meeting.
2. Why did you rate it this way?
3. Do you have any suggestions regarding implementation?
4. Any other comments?

When the questionnaire is completed, take time to discuss their insights and gain clarity on adjustments to be made.

Ideally, all of the meeting participants are involved in monitoring and adjustment of implementation of the results of the meeting or workshop. At a minimum, we recommend that everyone who was responsible for leading aspects of implementation participate, with clear and transparent communication of the results of monitoring being shared with all participants.

We have given some ideas about monitoring and adjustment. There is an attitude with monitoring and adjustment that is different than the attitude with performance management, hence we favor monitoring and adjustment. Performance management places greater emphasis on judging what has happened. Performance management isn't a flow, rather more of a point in time. Monitoring and adjustment has more of an energy of forward progress, recognizing that everyone involved gave their best, and yet through monitoring now and over time, adjustments can be made to build on learning.

Note your thoughts about what you would do to assist a sponsor team with monitoring and adjustment regarding their use of WPPF for meetings as well as implementation of the results of the meeting.

Notes:

Learning summary

You have gone through many activities to understand the approach to monitoring and adjusting for your personal learning and for organizations working with WPPF. You are invited to review your notes, reflections, and insights and to do a brief and clear summary of the value of monitoring and adjustment that you feel is important to remember or refer to.

Notes:

Thank You

It is now time for our own closing circle. Thank you for participating in this learning journey. We ask that you complete an evaluation form before you leave.

And of course, we would be delighted to see you take the full Genuine Contact™ program. Training dates and locations are available at www.genuinecontact.net.

And if you were pleased by this program, please pass word on to others. Thank you and journey well.

Credits and Acknowledgements

- This learning module was created by Birgitt Williams of Dalar International Consultancy. Birgitt and Ward Williams created the Genuine Contact™ program and approach and can be reached at www.dalarinternational.com.

- Open Space Technology was created by Harrison Owen and is described by Harrison Owen in his books published by Berrett-Koehler.

- Whole Person Process Facilitation was created by Birgitt Williams and Ward Williams of Dalar International Consultancy, Inc with a foundation in the work of Marge Denis of Stillpoint, Huntsville, Ontario, Canada in Process Facilitation.

- The manuals and other media for the Genuine Contact™ program were edited, designed and produced by Rachel Bolton of Dalar International Consultancy in Kitchener, Ontario, Canada. She can be reached at rachel@dalarinternational.com.

- A comprehensive bibliography for the Genuine Contact™ program and a recommended reading list for this learning module is available on www.genuinecontact.net.

Become a Member

You are invited to become a member of the Genuine Contact Organization. To support and invest in this organization and its work to spread Genuine Contact in the world.

For over 2 decades, Genuine Contact has grown and spread in the world through reciprocal relationships. While learning the modules of the Genuine Contact Program teaches tools and methods that can be applied immediately, being a member of the Genuine Contact Organization and contributing to its work offers an ongoing opportunity for learning deeply about the Genuine Contact way of working.

Built on a foundation of 5 beliefs, the 9 modules of the Genuine Contact Program, working with the Medicine Wheel Tool, and mentoring, our members contribute their time, passion, and wisdom to spread Genuine Contact in the world while benefitting from a powerful and holistic way of working in organizations and a vibrant membership community.

Membership is open to people who are ready to:

- experience great benefit through the insights, wisdom, and relationships you have by being a member of this ongoing mentoring circle
- find value in the resources that are available to you through your connection to this organization
- benefit in using Genuine Contact in your work and want to contribute to its ongoing growth and development
- have a desire to participate in and contribute to the success of the Genuine Contact Organization that makes all of this possible

Membership is much more valuable than any list of services and benefits could possibly communicate. The real value is in the relationships developed, the connections made and the opportunities taken advantage of through time spent with other members. There are also quite a number of direct, tangible benefits that our members use from the moment they join – making the decision to become a member an easy one.

Choose Your Membership Package

With 6 membership levels to choose from, there is one that's just right to meet your learning need and your contribution goals – choose the one that suits you best, and if you have any questions, feel free to contact our Director to help you choose just the right option.

For as little as $99 annually, you can support the future of the Genuine Contact way of living and working.

Learn more about membership at https://genuinecontact.net/membership/

Genuine Contact Quality Commitment

Preamble

Genuine Contact™ Professionals have adopted a holistic approach to leadership and organizational development based on the approach, program, and power of the Genuine Contact Program. They have developed competence in working with at least Whole Person Process Facilitation (Module 2) of the Genuine Contact Program to assist leaders and organizations in their development.

Genuine Contact Professionals, when working with modules of the Genuine Contact Program in their work as organizational consultants, leadership development consultants, and meeting facilitators, work within the scope of the modules that they have developed competency in. Genuine Contact Professionals may also apply different meeting methodologies like World Café, Appreciative Inquiry if they seem more suited to the business goal.

Depending on the needs of the client, a Genuine Contact Professional can pull larger teams together from amongst the Genuine Contact Professionals, and others whose work is in alignment with our quality commitment, when needed.

To ascertain if someone is a Genuine Contact Professional, a client can check with the Genuine Contact Program Director at gcprodir@gmail.com. While the Program Director cannot remark about the competence of the person, s/he can verify that a Quality Commitment has been made. Leaders and organizations seeking to engage a Genuine Contact Professional are responsible for selecting him/her and doing their own reference checks.

Genuine Contact Professionals make the following commitments to ensure the most beneficial results of their work and recommit to this Quality Commitment annually.

Quality Commitment

I assure the quality of my work with the following:

Meeting Facilitation

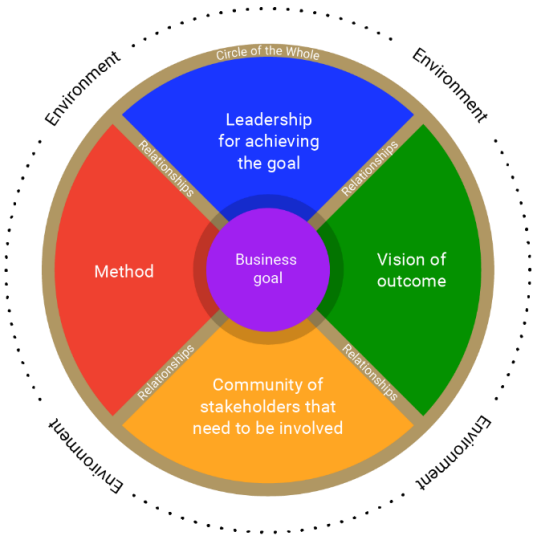
When working with the Genuine Contact™ approach to facilitate meetings, I follow an established protocol which includes preparation meetings, facilitation of the main meeting, facilitation of a debrief meeting, and ensuring a follow up accountability meeting whenever possible. I use Whole Person Process Facilitation as the participative and creative method for the preparation and debrief meetings and either Open Space Technology or Whole Person Process Facilitation or another participatory approach such as Future Search, World Café, or Appreciative Inquiry (all credible participatory meeting methods) for facilitating the conference or main meeting.

Even when meeting methodologies are used that are not part of the Genuine Contact program, they will be conducted within the operating platform of a Whole Person Process Facilitation meeting, when possible.

Upon completion of the conference and/or meeting, I can provide my clients with an evaluation, based upon participant feedback upon request.

Longer Term Consulting Services for Personal Development, Leadership Development and/or Organizational Development

At the time of contracting, I and my client ensure that we have:



- clarity about the business goal of the assignment
- leadership considerations regarding success of the assignment in the organization
- expectations of the client (deliverables)
- who the people are who need to be involved for the assignment to be successful
- the design
- how the relationships will be worked out for success
- how the collective intelligence of the organization will be accessed if needed.

A schedule of review meetings will be established for course correction as needed in relation to the initial scope of the agreement. I understand the importance of continuous review and change rather than waiting until the final review.

Personal Competence, Capability, and Capacity Development

As Genuine Contact Professional, I commit to my ongoing personal competence, capability, and capacity development with:

- Ongoing participation in the Genuine Contact mailing lists (international & language-specific if available)
- International Genuine Contact Mentoring Circles (in person as well as in online environment)
- Regional and/or local Genuine Contact Mentoring Circles
- GC Newsletters / Blogs
- Participation in at least one Genuine Contact training annually, either through intensifying learning in a familiar module or taking additional modules, to be done in person, on-line, or by reviewing a GC training workbook.
- Any other engagement in Genuine Contact activities

Environmental Protection Policy

I use food, materials and techniques that ensure the least possible negative impact on the environment. This includes - whenever possible - but is not limited to recycled (flipchart) paper, water-based markers, refill-products, organic food, snacks and drinks, energy saving technical products.

The Genuine Contact™ Program

Beliefs, Components, Key Concepts and Foundational Givens

Birgitt and Ward Williams designed the Genuine Contact™ program with simplicity in mind. The program, focusing on attending to organizational health and balance as a foundation for organizational success, uses meetings as a catalyst for organizations to develop as conscious, life nurturing, interconnected creative organizations. Meetings are used as a catalyst. Management learns to manage differently. We call these organizations Genuine Contact Organizations. The process is organic so that every organization brings about its own unique change from within.

Beliefs of Genuine Contact

Within the Genuine Contact approach and program, we work from the following five foundational beliefs:

1. We believe that spirit or Spirit matters, that through spirit or Spirit, all creation is connected, and that people are precious.
2. We believe that every organism (including the organization) has within it the blueprint for its own optimal health and balance.
3. We believe that focusing on genuine contact enables individuals and organizations to achieve the individual and organizational health and balance that is needed for optimal effectiveness. Positive change in the organization is directly linked to positive change in individuals. Both are required for sustainable new ways of working.
4. We believe in keeping it simple. Simple frameworks and processes enable success with complex situations. In keeping it simple, we recognize that any sustainable change must begin from the inside and cannot be externally initiated or driven.
5. We believe that change with its accompanying loss, grief work, and conflict is constant. Organizations that develop mastery in working with change can sustain optimal effectiveness. These leaders and organizations recognize that change cannot be managed, that energy spent trying to manage change is wasted energy, and that productive use of individual and organizational energy is achieved by working with change rather than against it.

Components of the Genuine Contact™ program

The Foundational Learning Modules and Advanced Skill Development Learning Modules make up the Genuine Contact program and approach. The series provides skill, capacity, and competency development in the Genuine Contact program as well as providing the conditions to assimilate the Genuine Contact approach.

1. Foundations 1: Path to Organizational Health and Balance offers leaders an opportunity to make the difference in the performance of your organization through the importance of balance, cleansing, and nourishing in a way similar to the holistic approach to the health of the human body.

2. Foundations 2: Achieving and Regenerating Organizational Health and Balance
   explores the state of health of organizations from a holistic organizational growth perspective and aids in developing your own prescription through a self-administered diagnosis, towards achieving and maintaining a healthy organization in these rapidly changing times.

3. Foundations 3: Individual Health and Balance
   explores the state of individual health and how to maintain a state of optimal health even in highly stressful situations.

4. Foundations 4: Holistic Leadership Development
   develops the skills, capacity, and knowledge for the new leadership paradigm 'leading so that people will lead' and to nourish a culture of leadership.

5. Advanced Skill Development 1: Working with Open Space Technology
   develops and enhances skills in facilitating meetings in which a frequency is held for people to make life nurturing choices from amongst agenda items within a particular theme and givens.

6. Advanced Skill Development 2: Whole Person Process Facilitation
   develops and enhances skills in facilitating meetings in which a frequency is held for people to make life nurturing choices based on what is presented to them to solve within a particular topic and within stated givens.

7. Advanced Skill Development 3: Cross Cultural Conflict Resolution
   develops and enhances skills to facilitate meetings in which people determine personal boundaries and view situations from flexible rather than fixed perspectives.

8. Advanced Skill Development 4: The Genuine Contact Organization
   develops and enhances skills in leading and mentoring conscious interconnected learning organizations. These organizations provide the conditions for choices to be life nurturing rather than life depleting.

9. Advanced Skill Development 5: Train the Trainer
   develops and enhances skills to teach others in all the components of the Genuine Contact™ program, ensuring that the program maintains its integrity (wholeness) and respects the unique contributions that each individual makes to the program.

10. We offer Mentoring as a forum to learn the art of mentoring and to walk the talk of mentoring of both individuals and organizations.

11. We underpin the Genuine Contact™ program with the healing circle or medicine wheel as the overall matrix for our learning, healing, development, evolution, and consciousness. As Medicine Wheel Tool© it assists us in walking the mystical path with practical feet and bringing about results that exceed expectations.

Key Concepts of working with Genuine Contact™

There are 9 key concepts supporting the foundational beliefs and development of the Genuine Contact Program:

1. Opportunities for genuine contact begin with the courage to be in genuine contact with the self and extend into all relationships.

2. Work of, with, from, and to Spirit can be experienced as a harmonic resonance that can be facilitated, beginning with establishing the harmonic resonance within the self as the facilitator. This requires discipline in a state of BEING in this harmonic resonance as the key work for the facilitator. In doing so, we work with healing energy, drawing from knowledge in the healing arts.

3. We work with the blueprint for health in the organism (the individual and/or the organization) by attending to balance, cleansing, and nourishing.

4. Change is constant, and organizations must be developed to thrive in change. Organizational effectiveness in motion is a required organizational capability if they wish to thrive in future times of intense change.

5. We use meetings as a catalyst to assist the organization attain a state of health and balance. The two meeting methodologies used are Open Space Technology developed by Harrison Owen, USA and Whole Person Process Facilitation developed by Birgitt, USA. Both meeting methodologies are highly participative, within a boundary established by predetermined “givens".

   Within Open Space Technology, a harmonic frequency is held for people to make life nurturing choices from amongst agenda items within a particular theme and givens.

   Whole Person Process Facilitation was developed by Birgitt Williams to complement working with Open Space Technology as a meeting methodology equally as participative, with similar values, and yet serving the organization when a process as open as Open Space Technology is not appropriate to the agenda and circumstance.

   Within Whole Person Process Facilitation, a harmonic frequency is held for people to make life nurturing choices based on what is presented to them to solve within a particular topic and within stated givens. The topics are predetermined, thereby offering a more obviously structured agenda than Open Space Technology.

6. We believe that a liberating structure, combined with a participatory architecture is essential to achieve and sustain organizational health and balance so that organizations are highly effective and able to thrive in constant change.

7. We work with Open Space Technology and Whole Person Process Facilitation as interventions that enable health and balance in the ongoing life of the organization. We recognize these meeting processes as powerful and impactful in the ongoing life of the organization, therefore we attend carefully to both the pre-work (before a meeting) and the debrief work (after the meeting).

8. We recognize that everyone facilitating and leading using the Genuine Contact™ program will do so with their own unique style and experience. However, it is also necessary to guarantee to organizations who bring this program into the organization that they are receiving consistency with the component parts and/or their development as a genuine contact organization. Clients are entitled to assurance that when they engage in any components of the Genuine Contact™ program, that it maintains integrity. Within the Genuine Contact™ program, the components are standardized and can be easily duplicated. When any of the components are offered in an organization, the client is guaranteed of a certain standard.

9. Component parts of the program have value if taken on their own.

Foundational Givens of the Genuine Contact™ program

Birgitt and Ward Williams established minimal Foundational Givens for the Genuine Contact™ program. Foundational Givens define the approach and are not open for change. Basically, Foundational Givens are keys in defining what the program is and what it is not. On September 21st, 2001, Birgitt and Ward Williams invited the first group of graduating GC Trainers and all graduating GC Trainers in subsequent years, to participate in a Genuine Contact Organization within the theme of developing the approach within the following five Foundational Givens listed below.

In 2006 the GC Co-Owners Group Ltd. was formed, and additional Operating Givens of the GC Co-Owners Group Ltd. have been developed over time and are open for review and change by all members of the organization. The Operating Givens are available in the Co-Owners Space online (ask Program Director for access). Foundational givens are not open for change.

Foundational Givens:

1. The 5 foundational beliefs as noted above.
2. There are 11 components of the Genuine Contact™ program as noted above.
3. Requirement to provide the Workbooks developed by Birgitt and Ward Williams when a GC Training is offered.
4. Limited givens, maximum choice, and participation.
5. Limited external consultant involvement with maximum skill and capacity building.

The overall goal is to have the Genuine Contact™ approach and program make a life nurturing difference in the world.

For more information visit **genuinecontact.net**