

Meetings that matter

# **Results Based Facilitation**

**Moving from talk to action**

**Book One  
Foundation Skills**

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# Introduction

*We have to do the best we can. This is our sacred human responsibility.*

– Albert Einstein

The two books *Results Based Facilitation: Book One — Foundation Skills* and *Results Based Facilitation: Book Two — Advanced Skills*, present proven practice methods and competencies that help people work together to make meaningful and visible improvement in the lives of children, adults, and families. These two books represent an extension and reorganization of the *Results Based Facilitation Workbook V5.61*. That workbook and its predecessors have been distributed to thousands of people over the past 15 years.

During that time, hundreds of leaders and facilitators have used Results Based Facilitation (RBF) in service to their organizations, neighborhoods, and communities. From their application of the methods and competencies, evidence is emerging that practicing RBF leads to productive meetings that move people to results.

The most significant changes from the prior workbook include the organization of the skills into six competencies. The skills may be used by *both* the facilitator and participants to hold more productive meetings. Each skill is presented at three levels of mastery with descriptions, exercises, tips, and reflective practice questions.

Another advancement is the inclusion of the Hold Mental Models and Hold Action and Results competencies. These competencies, found in *Results Based Facilitation: Book Two — Advanced Skills*, extend RBF into implementation of meetings that move to action and contribute to measurable improvement in results.

## What Is Results Based Facilitation?

Results Based Facilitation is a competency-based approach to participating in and facilitating meetings in order to get results. The six RBF competencies used by participants and facilitators move groups from talk to action that produces results within programs, organizations, and communities. This is done by focusing on meeting results and by developing an accountability framework for commitments to aligned action. The central organizing concept of RBF is that of achieving results and accountability for results. Using RBF, meeting participants can

*Enter with results in mind and leave with action commitments in hand.*

## What Are Results Based Facilitation Competencies And Skills?

RBF consists of six competencies that enable groups to act collaboratively, make decisions together, identify how as individuals and as a group they can contribute to an acceleration of action to achieve observable results, and commit to take those actions in an aligned way outside of the meeting.

The six RBF competencies are the ability to:

1. Hold roles,
2. Hold conversations,
3. Hold groups,

4. Hold 3R meetings,
5. Hold mental models, and
6. Hold action and results.

The last two competencies are the subject of the next book in the series *Results Based Facilitation: Book Two — Advanced Skills* (which will be abbreviated as Book Two). The six competencies, a brief description, and the associated twenty-two distinct skills are listed in Table I-1:

**Table I-1: The 6 RBF Competencies and 22 Skills**

<b>Results Based Facilitation: Book One — Foundation Skills</b>
<b>Hold Roles:</b> <i>Be aware of and make choices about roles that contribute to achieving meeting results.</i>
Use B/ART to define and differentiate roles
Use B/ART to understand group dynamics and achieve meeting results
Hold neutral facilitator role
Give the work back to the group
<b>Hold Conversations:</b> <i>Listen with openness, curiosity, and attentiveness to frame dialogues to achieve meeting results.</i>
Demonstrate appreciative openness
Use Context Statements, Effective Questions, Listen Fors
<b>Hold Groups:</b> <i>Support groups to hold focused conversations that achieve meeting results.</i>
Flip chart to display the group's work
Sequence
Summarize
Synthesize
Check-In and Check-Out
<b>Hold 3R Meetings:</b> <i>Use the 3Rs to design and facilitate conversations and meetings that move groups from talk to action.</i>
Use the 3Rs to design the meeting
Use the 3Rs in the meeting to get results
<b>Results Based Facilitation: Book Two — Advanced Skills</b>
<b>Hold Mental Models:</b> <i>Use a repertoire of perspectives that contribute to achieving meeting results.</i>
Use Proposal-Based Decision Making
Use conversations to develop convergence
Name and address barriers to convergence
Make and help others make action commitments
Be and help others be accountable for action commitments
Observe and respond to group dynamics
Assess and address conflict
<b>Hold Action and Results:</b> <i>Make a difference in programs and community populations.</i>
Be accountable in role for contributions to results
Use RBF skills to work collaboratively to accelerate progress toward results

**Table I-2: Example of Skill Levels — Using a Flip Chart to Display the Group's Work**

Awareness	Application	Mastery
-----------	-------------	---------

Results Based Facilitation skills are needed because many meetings tend to waste a lot of the

✓ Sat through a meeting feeling frustrated and bored?

- Through these experiences, you may have noticed that frustrating and boring meetings can ac-

✓ People do not make effective decisions, but instead, they struggle and spin and make deci-

their problems will be solved.

- ✓ Some attendees do not contribute their insights, energy, or talents to a common goal, instead shutting down emotionally and intellectually and distancing themselves from each other and the work.
- ✓ People accept the desires and decisions of the few who promote their own solutions or agendas instead of putting forth and exploring ways to meet their own interests.

The premise of this book is that these experiences and feelings are the unintended consequences of meetings conducted in an unproductive way. Because of these negative, unintended consequences, unproductive meetings can be worse than no meeting at all. No one sets out to have a frustrating, boring, useless meeting, but this sad state of affairs is all too common.

One solution is to have no meetings or very few, thus limiting the pain of attending boring and frustrating meetings. However, this can limit the gains that are possible. Many urgent and important issues in our organizational and community lives can only be solved by people working together creatively and effectively.

## What Are the Benefits of Using RBF Skills?

If you are experiencing these kinds of meetings, then you may need RBF skills (and an understanding of related theories), so you can have productive meetings that move people from talking to taking action that produces results. People who must work together to address urgent and important issues need a way to hold productive meetings that lead to positive outcomes, such as:

- ✓ stronger relationships
  - ✓ clearer communication
  - ✓ active participation
  - ✓ shared learning
  - ✓ exciting insights
  - ✓ creative problem solving
  - ✓ robust solution development
  - ✓ helpful conflict resolution
  - ✓ effective decision making
  - ✓ commitment to action
  - ✓ follow-through on commitments to action that produce results



RBF is one way to hold productive meetings. As a meeting participant, convener, or facilitator, you can integrate and apply RBF approaches and skills to your work.

## How Do I Develop the RBF Competencies and Skills?

The development of RBF skills begins by assessing where you are now in your awareness of RBF skills. From that awareness, you have the opportunity to learn and enhance your skills through practice, reflection, application, and feedback. The development of RBF skills is personal and, by necessity, reflects where you are, who you are, and where you want to go. There are three stages of the journey where you will *develop an awareness of the skills, apply the skills, and make the*



*skills your own.*



***become aware of skills***



***apply the skills***



***make the skills your own***

The path to mastery will be hard at times; it demands patience and discipline to understand the theory and integrate the skills. However, by practicing the skills, you will be able to contribute to people working well together, and you will begin to see how productive meetings can contribute to achieving good things in your organizations and communities.

## **How This Book Supports RBF Skill Development**

This book offers an approach to meetings that, if used with skill, will create more productive meetings that lead to real results. It is written for anyone interested in being a more effective meeting participant or in convening or facilitating meetings.

This book is organized to support your unique learning style, offer you opportunities to reflect on your experience, help you adopt and practice skills, and help you learn and apply the theory. You may use this book in one of two ways: (1) read this book from cover to cover, learning the theory and practicing the skills over time or (2) can choose any section and use the contents of that section to meet an immediate need.

Let's take a look at the organization of this book and find out how each chapter can contribute to your journey.

### **Chapter 1: Purpose, Theory, and Practice Method**

This chapter introduces:

- ✓ the theory underlying RBF,
- ✓ the RBF competencies,
- ✓ the RBF developmental continuum, and
- ✓ the RBF practice methods, including how to both give and receive skill-focused feedback.

The remaining chapters present the four RBF foundation competencies. In these chapters you will gain an awareness of the skills, assess your skill level, and find ways to practice your skills.

The exercises and reflective practice questions often integrate the use of the Myers-Briggs Type Indicator® (MBTI®) preferences to help you become aware of your own learning style as you consider how to develop and master each skill.



Practicing the skills daily as a participant in meetings can also lead to mastery. Fortunately, such practice opportunities abound. Every day there are many conversations in which, even though you may not be a facilitator, you are a meeting participant, an employee, a community member, or a family member. These are settings where you can use the RBF skills to listen appreciatively, clarify meaning, explore issues, create greater understanding, and (where appropriate) move to action. Practicing the skills as a meeting participant is both helpful in achieving results and one of the most effective ways to develop skills. For each skill, there is a table with this icon labeled the Participant Practice Guide containing suggestions for using the skills.



## Chapter 2: Hold Roles

*Be aware of and make choices about roles that contribute to achieving meeting results.*



The understanding of how people hold roles is the first RBF competency. The Person-Role-System Framework and the concept of boundaries of authority, role, and task (B/ART) enable you to consider your own role and that of others in meetings. You will develop the Hold Roles competency, which includes:

- ✓ defining and differentiating roles as they contribute to meeting results,
- ✓ understanding group dynamics to achieve meeting results,
- ✓ holding a neutral facilitator role, and
- ✓ giving work back to the group.

## Chapter 3: Hold Conversations

*Listen with openness, curiosity, and attentiveness to frame dialogues that move groups to achieve results.*



In this chapter you will develop the competency, which includes:

- ✓ demonstrating openness and genuine curiosity through the quality of your listening, and
- ✓ using a context statement, effective questions, and an awareness of what to listen for in conversations.

## Chapter 4: Hold Groups

*Support groups to hold focused conversations that achieve meeting results.*



This chapter includes the following skills needed to hold groups in focused conversations:

- ✓ flip charting to document the work,
- ✓ the sequencing of speakers, topics, and work to have one conversation at a time,
- ✓ the summarization of ideas, proposals, and decisions to support the group's ability to make decisions,

- ✓ the synthesis of ideas, meaning, and group dynamics to enable groups to move from talk to action, and
- ✓ checking in and checking out to support groups in beginning and ending their work together focused on results.

## Chapter 5: Hold 3R Meetings

*Use the 3Rs (Relationships, Resources, and Results) to design and facilitate conversations and meetings that move groups from talk to action.*



This chapter contains the skills that enable you to:

- ✓ design meetings using the 3Rs, and
- ✓ hold meetings that lead to results using this framework.

These skills enable you to consider the 3Rs (relationships, resources, and results) as you prepare for meetings that will predictably move from talk to action. The chapter includes templates for designing your meetings using this framework.

## Chapter 6: Continuing on the Path to Mastery



Like many things in life, practice is an essential element of success. This chapter allows you to consider how best to continue your practice of the four foundation competencies. Once you've mastered the foundation skills, you may see the need for the advanced competencies to address more complex group dynamics. This chapter provides an overview of the two advanced competencies (Hold Mental Models and Hold Action and Results) that address common barriers that prevent groups from moving from talk to action. These two competencies are found in the next book in this series, *Results Based Facilitation: Book Two — Advanced Skills*.

The Hold Mental Models competency is based on the premise that: *“Problems cannot be solved by the same level of thinking that created them.”*<sup>3</sup> To stimulate new levels of thinking, this competency introduces a repertoire of mental models designed to support groups in clarifying issues, addressing challenges, and building the relationships and making decisions needed to move from talk to action. The repertoire includes:

- ✓ using Proposal-Based Decision Making to move groups from talk to action,
- ✓ using conversations to develop convergence, maintain momentum, and establish an accountability pathway,
- ✓ observing and responding to group dynamics, and
- ✓ assessing and addressing conflict.

The Hold Action and Results competency focuses on examples of what it looks like when RBF skills and methods are employed by people working to make a measurable difference in their organizations and communities. The chapter on this competency includes specific conversations and meeting designs that have proven effective in enabling groups to:















- ✓ adopt a common result and ways to measure progress toward that result,

<sup>3</sup> Attributed to Albert Einstein.

- ✓ commit to and be accountable for aligned actions to implement collaborative strategies that contribute to program- and community-level results,
- ✓ develop the capacity to address differences across the boundaries of sector, gender, race, ethnicity, and world view to build sustainable relationships necessary to persist in action long enough and well enough to make a measurable difference in the wellbeing of children, families, and communities, and
- ✓ support your practice.

In each of the chapter of this book, you will find a detailed description of the skill accompanied by specific activities to build the skill. Icons are used throughout this book to provide quick visual clues about the content. The Table I-3 illustrates the icons used. Finally, Table I-4 lists the definitions of the acronyms used throughout the book.

**Table I-3: Important Icons**

	Application of a skill		Mastery of a skill
	Awareness of a skill		Myers-Briggs Type Indicator® (MBTI®)
	Checklist		Participant practice guide
	Check-in or Check-out		Progress or advancement
	Exercise		Reflective practice
	Differential impact		Self-assessment
	Individual development plan (IDP)		Tips

**Table I-4: Glossary of Acronyms**

3Rs	Results, Relationships, and Resources	MBTI	Myers-Briggs Type Indicator
ARE	Acknowledge, Rephrase, and Explore	PBDM	Proposal-Based Decision Making
B/ART	Boundary of Role, Authority and Task	PRS	Person-Role-System
CS	Context Statement	RBF	Results Based Facilitation
EQ	Effective Questions	RBL	Results Based Leadership
LF	Listen For	SBI	Situation Behavior Impact

# Chapter 1: Purpose, Theory, and Practice Method

**skill:** the ability to use one's knowledge effectively and readily in execution or performance.

**facilitate:** to make easier: to help bring about.

– Merriam-Webster Online Dictionary

## RBF Purpose

The purpose of this book is to help people understand and practice the skills they need to participate in and facilitate productive meetings — meetings that lead to action and produce desired results. By using this book as a practice guide you will be better able to understand the theory of Results Based Facilitation (RBF), become aware of the RBF competencies and skills, assess your current use of the skills, and practice your skills to produce results in meetings.

Achieving results using RBF skills requires practice. The motivation for practice is found in the answer to question: *What's in it for me?* Throughout the book, reflective practice questions help you see the benefit of practicing the RBF methods. When you answer these questions you are checking-in to the work, i.e., discovering the connections between your own motivations, goals, and aspirations and the purpose of this book. A check-in involves aligning what *you* are looking for and what is offered.

**Check-In:** A process to facilitate connections to a person or people and a task. When checked in people are ready to work together.

### Reflective Practice: RBF Benefits

- ① What tangible benefits are you seeking from RBF study and practice?
- ② If you are successful in developing RBF skills, what would you be able to accomplish as a participant or a facilitator?
- ③ Is what you hope to get from learning RBF aligned with the results this book is designed to produce?



If you keep these answers in mind as you develop your RBF skills, you are more likely to achieve your own goals and get the benefits you desire.

## RBF Theory

RBF theory defines *meetings* as the engagement of people toward achieving common purpose. The theory focuses on the what and how of the behaviors and relationships that contribute to actions that produce results.

RBF employs a skillset designed to make it easier for people to engage and work together to achieve a common purpose. RBF creates meetings of the mind and heart that lead to aligned, accountable actions directed toward producing desired results.

RBF is a collaborative leadership competency grounded in an emerging theory of change, The Theory of Aligned Contributions.<sup>1</sup> Preliminary evidence suggests that using RBF competencies

*He who loves practice without theory is like the sailor who boards ship without a rudder and compass and never knows where he may cast.*  
– Leonardo Da Vinci

<sup>1</sup> Pillsbury, Goddard-Truitt (Editor). *The Theory of Aligned Contributions*, Sherbrooke Consulting, Inc. 2007, 2010.

contributes to leaders taking action together and over time holding themselves accountable for making progress toward organizational, neighborhood, or community results.<sup>2</sup>

## Theory of Aligned Contributions

The *Theory of Aligned Contributions* posits that people practicing a specific skillset can be in high alignment and high action toward a common result. Emerging evidence indicates that groups using this skillset are more likely to make decisions together, hold themselves publicly accountable for aligned action, and contribute to organizational and community results.<sup>3</sup>

**Meeting** — (1) the act or process or instance of coming together; an encounter.  
(2) an assembly or gathering of people, as for a business, social, or religious purpose. Idiom: meeting of the minds. Agreement; concord.  
— Webster's Dictionary

The research further suggests that these skills — learned and practiced either by a meeting participant and/or an explicitly authorized facilitator — enable a group to own a common result, build the relationships necessary to work together to achieve the result, and contribute resources (knowledge, passion, influence, and capacity to act) to the common result.

Over time, with accountability for action, groups can contribute to measurable improvement in program, neighborhood, and community results. The catalyst for action and results is the alignment of individual interests with group interest, i.e., what individuals want is aligned with the purpose of the group's work.

### Reflective Practice: Results Alignment

Consider meetings you have participated in. Take a moment to reflect on what the individual participants might have wanted from a meeting and the intended results of the meeting:

- ② What was the degree of alignment between individual results and meeting results?
- ② How did alignment or lack of alignment between individual results and meeting results impact the group's ability to move to action?



## The Three RBF Hypotheses

The work of alignment occurs through the interaction of individuals in meetings that move from talk to action. To support the work of alignment in meetings, there are *three RBF hypotheses* that inform which competencies are included in the RBF skillset, how those competencies are defined, and what the sequence is for learning and applying the competencies.

**Hypothesis** — A supposition or proposed explanation made on the basis of limited evidence as a starting point for further investigation.  
— Oxford Dictionary

### **Hypothesis #1:** *The work of meetings occurs through conversations*

Any meeting can be seen as a series of conversations of differing length. Within longer conversations are smaller conversations, each with an identifiable beginning, middle, and end.



<sup>2</sup> *Achieving Results with Collaboratives*. Research Brief. Fall 2011. The Results Based Leadership Collaborative at The University of Maryland School of Public Policy. <http://www.publicpolicy.umd.edu/rblc>.

<sup>3</sup> Littlefield, O'Brien, and Hersey. *Participant or Spectator: Non-profit Engagement in Multi-Sector Collaboratives*. American Society for Public Administration Conference. Baltimore, MD, March, 2011.



Groups can have a series of conversations that create both meaning and movement toward action and results. A *group conversation* is defined as people listening to and talking about the same thing at the same time in a way that over time leads to:

- ✓ understanding and relationship building,
- ✓ problem solving and conflict resolution, and
- ✓ decision making and commitment to accountable, aligned actions.

**Hypothesis #2:** *Group conversations can be designed, prepared for, and flexibly supported by someone with a set of listening and speaking skills*



There are design, preparation, and interaction skills that can be seen, named, practiced, and applied to all conversations. Each person in his or her role can practice these skills in conversations and can contribute to group ownership of the purpose and moving to action. Learning and applying these skills start with awareness and choice about a role and a willingness to practice the skillset.


**Hypothesis #3:** *A person holding a neutral role, using a set of listening and speaking skills to support the work of a group, can accelerate the work of a group*



Holding neutral in any role occurs when a person gives the work back to the group and does not use his or her authority to pursue a personal agenda. Holding neutral in a facilitator role is aided when the group authorizes:

- ✓ specific tasks in support of achieving the articulated purpose of the group, and
- ✓ within commonly understood boundaries of time and place.

Reflective Practice: The Work of Meetings	
②	What are your assumptions about the work of meetings?
②	What are your assumptions about the role and authority of a facilitator?

An illustration of a stylized orange figure with a thought bubble above its head.

## RBF Developmental Sequence

Using skills in the neutral facilitator role is a central tenet of the three hypotheses. The theory holds that role awareness is a precondition for effective RBF skill development. From that awareness of role, people can begin to consciously participate in conversations in a way that moves groups from talk to action around a shared result.

A developmental sequence that starts with role awareness illuminates for people how and when the specific competencies and skills can be deployed. The sequence supports the application of the skills in a variety of roles and circumstances, increasing the opportunities for practice and places where the competencies and skills can provide value. The developmental sequence, in and of itself, provides immediate benefit to the practitioner.

A competency that creates role awareness, role choice, and role discipline can provide new opportunities to move from talk to action in multiple roles. If you can see your role and task, then it is more likely that you can find a way to take action and move toward results.

### The developmental sequence (scaffolding) of the competencies is:

1. **Hold Roles** — The first competency is to become aware of how people hold roles in meetings and choose to develop the skill of holding the neutral role (when beneficial) as a participant or as an authorized facilitator.
2. **Hold Conversations** — The second competency is to become aware that conversations are the focus of collaborative work and to choose to participate in conversations with an appreciation of and openness to other people and their points of view.
3. **Hold Groups** — The third competency is to become aware that groups are composed of diverse individuals. As a result, they choose to understand each individual's perspectives, preferences, and interests, using methods to facilitate and support groups to have one conversation at a time.
4. **Hold 3R Meetings** — The fourth competency is to become aware of the structure and process of conversations and to choose to master and apply methods that will help you design and execute meetings that produce results.
5. **Hold Mental Models** — The fifth competency is to become aware of the range of mental models and choose to master and apply mental models that contribute to moving groups from talk to accountable, aligned action.
6. **Hold Action and Results** — The sixth and final competency is to become aware, that in meetings, groups can commit to aligned action and choose to work toward achieving meeting results that lead to organizational or neighborhood results, and ultimately, community results.



### Deploying Skills in Different Roles

Through this six-tiered developmental progression, the skills are cumulatively built to enable people to achieve meeting results that are a step along the way to organizational or neighborhood results, and ultimately to community results.

Within a framework of person in role, role in system, people can consider how to deploy these competencies as a participant, facilitator, supervisor, or meeting chair. By using the six competencies in different roles, people can define the meeting results, design and prepare for meetings, support a group in achieving the defined meeting results, or flexibly adopt different meeting results based on the work of the meeting and the meeting dynamics, be accountable for progress toward meeting results, and over time, know if the achieved meeting results lead to actions and results in organizations, neighborhoods, and communities.

#### Reflective Practice: Roles

- ① What role(s) do you typically play in meetings?
- ② What do you hope to achieve in your various roles by mastering these competencies?



### Differential Impact

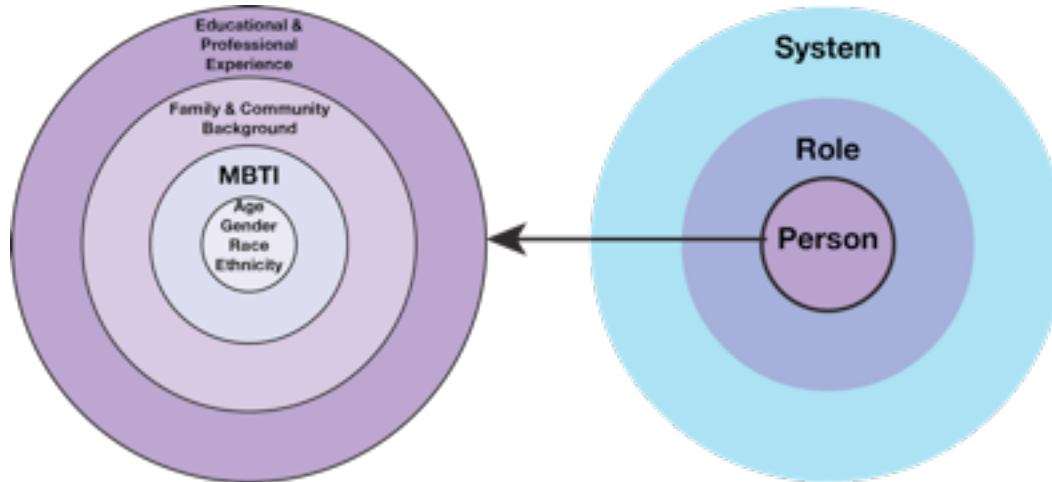
For groups to own a common result, it is helpful to have an understanding of how people, in a variety of roles, may differ in their behavior and interests as they hold conversations and work together in meetings. RBF uses the concept of differential impact to illuminate how people engaged in the same conversation may have very different reactions to that common experience. Using research and methods based on the





the Myers-Briggs Type Indicator (MBTI), RBF illuminates *differential impact*. RBF integrates the approaches of the Person-Role-System<sup>4</sup> framework informed by Bion's work on whole-group relations<sup>5</sup>, and the use of preferences to understand differences and similarities in how people take in information, make decisions, and interact with their environment.

The Person-Role-System (PRS) framework, combined with MBTI, provides a common language for exploring how a person's unique characteristics influence their behavior in meetings and in their roles in organizational and community systems. The combination of the two approaches is useful in generating hypotheses about how individuals communicate in groups, make decisions, address change, and interact with each other in problem-solving and collaborative work.



**Fig. 1-1: Person-Role-System and MBTI**

The integration of the two approaches — PRS and MBTI — is one example of how the concept of differential impact supports groups moving to alignment. The understanding of differential impact is deepened when combined with other factors such as age, gender, race, or professional background that may influence how a person in a role behaves in meetings. In addition, the sector in which a person works — e.g., public, non-profit, for-profit, etc. — can have a significant impact on a person's behavior in meetings.

MBTI informs people about their preferences and is not about ability, skill or competency. Type describes strengths and preferences. It is not judgmental or immutable. Type is like handedness — most people prefer to use their left or right hand. They can use the other hand to write, open jars, throw a ball, or swing a golf club. But they tend to use their preferential hand when it's important or when they're not consciously choosing.

There are four dichotomies associated with MBTI. These dichotomies express preferences people have about where they get their energy, how they take in information, how they make decisions, and how they orient themselves to the external world. The four dichotomies are:

### ***Extroversion (E) or Introversion (I)***

An Extrovert gains energy from the external world of people or activities.

An Introvert gains energy from the internal world of ideas, emotions or impressions.

<sup>4</sup> Green and Molenkamp. *The BART System of Group and Organizational Analysis*. 2005.

<sup>5</sup> Neuman, Holvino and Braxton. *Evolving a "Third Way" to Group Consultancy: Bridging Two Models of Theory and Practice*. Group Relations Reader 3. A K Rice Institute. 2003.

## ***Sensing (S ) or Intuition (N)***

A **S**ensor prefers to use the five senses to gather the data and note what is actual.

An **iN**tuitive gathers data, but prefers to constantly synthesize, extrapolate, and note what might be.

## ***Thinking (T) or Feeling (F)***

A **T**hinker prefers to organize information to make logical, objective decisions. The Thinker will step outside the problem to decide.

A **F**eeler prefers to organize information to make decisions in a personal, value-oriented way. The Feeler places him- or herself in the problem to make decisions.

## ***Judging (J) or Perceiving (P)***





A **J**udger prefers a planned or organized life.

A **P**erceiver prefers to be spontaneous and keep options open.

These four dichotomies provide the basis for the 16 MBTI types. One of the useful ways to apply MBTI is to look at the combination of the Sensing or iNtuition with the Thinking or Feeling preference. The possible combinations — ST, SF, NF, and NT are called the four functional pairs because they say so much about how we function in life.<sup>6</sup>

MBTI provides a language for understanding one dimension of the dynamics of person-in-role that contributes to differential impact. For ease of reference, when using the lens of MBTI the RBF practice method uses the four functional pairs to understand differential impact. The four functional pairs provide an indication of what roles people may take in groups. An awareness of MBTI role preferences listed below illuminates differential impact at the person-in-role level. Table 1-1 illustrates the roles and problem solving and decision-making characteristics people may use in meetings.<sup>7</sup>

**Table 1-1: Roles in Groups and Characteristics for Problem Solving and Decision-Making**

Functional Pair	Role	Characteristics
 <b>NF</b>	Harmonizer/catalyst	Enthusiastic, insightful
 <b>SF</b>	Caretaker/supporter	Sympathetic, friendly
 <b>ST</b>	Stabilizer/operational excellence champion	Practical, matter of fact
 <b>NT</b>	Visionary/architect	Logical, ingenious

<sup>6</sup> [www.myevt.com/teamdev/4-mbti-function-pairs](http://www.myevt.com/teamdev/4-mbti-function-pairs).

<sup>7</sup> Hirsh and Hirsh. *Introduction to Type and Decision Making*. Consulting Psychology Press. 2007.

## The Collaborative Work Cycle: Accountability in Action

RBF skills are specifically designed to move groups from talk to aligned, accountable action. The skills are deployed within an overarching mental model of what is possible and desirable *in* meetings in order to produce what is possible and desirable *between* meetings. Figure 1-2 illustrates the mental model of the Collaborative Work Cycle.

8

*A mental model is an explanation of someone's thought process about how something works in the real world.. Mental models help shape our behavior and define our approach to solving problems and carrying out tasks.*

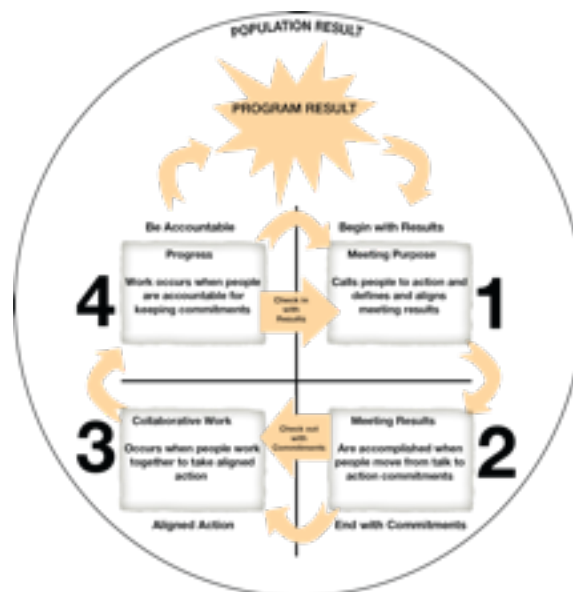


Fig. 1-2: Collaborative Work Cycle

The Collaborative Work Cycle is RBF's mental model of how to use meetings to move from talk to accountable, aligned action between meetings. RBF uses the competencies to catalyze accountability in action in an iterative cycle in which meetings are a step along the way to results. The figure above shows the collaborative work cycle as a series of steps from talk to action in and between meetings.

Table 1-2: The Collaborative Work Cycle Supports Accountability for Aligned Action

Step	Description
1	<b>Enter a meeting with a focus on results.</b> RBF methods and competencies ensure that people come to meetings with a specific purpose and meetings results in mind. The purpose and meeting results connect the work of the meeting to the work outside the meeting to accomplish program results that contribute to community results.
2	<b>Leave a meeting with commitments to action.</b> RBF methods and competencies allow people in meetings to have conversations that move them from talk (information sharing, idea generation) to solving problems and resolving conflict to developing what to do (action plan, strategy) to committing to action.
3	<b>Work to keep action commitments between meetings.</b> RBF methods and competencies support aligned action <i>between</i> meetings that focuses on execution of decisions and commitments made in meetings.
4	<b>Create accountability for action commitments between meetings.</b> RBF methods and competencies support the relationships and conversations that create accountability by intentionally assessing progress on action commitments made during meetings. The focus on accountability for aligned action replaces talking about results with doing the work of producing results.

### Reflective Practice: Accountability

- ① What is your orientation toward being accountable for action?
- ② Does accountability support you in moving to action?
- ③ How does your orientation toward accountability for action influence how you participate in meetings?
- ④ How does your approach to accountability for action inform how you facilitate meetings?



<sup>8</sup> [http://en.wikipedia.org/wiki/Mental\\_model](http://en.wikipedia.org/wiki/Mental_model).

## Defining Meeting Results

RBF requires a results framework and is compatible with most commonly used frameworks — such as, the Balanced Scorecard<sup>9</sup>. RBF is particularly suitable for supporting the implementation of Friedman's Results Accountability Framework.<sup>10</sup> This framework is

used in RBF to articulate the connection between what can be accomplished in meetings (meeting results) with actions between meetings that produce results in programs, neighborhoods, and communities. The ability to make a link between meeting results and neighborhood or organizational results, and ultimately, to community-wide results is often missing. Yet, without this link, meetings can remain all talk and not lead to purposeful action.

### Reflective Practice: Meeting Results

- ① What is your approach to defining and producing results?
- ② Is that approach grounded in a specific results framework?
- ③ How does your approach to results inform how you participate in meetings?
- ④ How does your approach to results inform how you facilitate meetings?



## Meeting Results Connect to Program and Population Results

*Accountability* is about knowing the difference you want to make and committing to making that difference. Naming the difference you want to make and being able to track if you are making progress is essential to achieving results. This results focus requires an orientation to using information — both qualitative and quantitative — in a disciplined way when participating in or facilitating results based meetings.

Answering the following three performance-accountability questions developed by Friedman is helpful to making that connection between the work of meetings and the work between meetings that produces results.

- ✓ **What did we do?**
- ✓ **How well did we do it?**
- ✓ **What difference did we make?**

The Friedman framework is used in the next few pages to illustrate how clearly defined meeting results can contribute in a measurable way to clearly defined organizational and community-wide results. The example uses the result of babies born healthy to illuminate how meeting results can produce commitments to action, catalyze work in organizations or neighborhoods, and contribute to more babies being born healthy in a community.


Answering the *what difference did we make?* question for meetings builds the bridge from talk to action as people hold themselves accountable for contributing to results in programs and communities.

Table 1-3 illustrates how answering the three questions at the meeting level *and* the actions taken outside the meeting contribute to neighborhood or organizational program results.

<sup>9</sup> Kaplan and Norton. *The Balanced Scorecard*. Hartford Business Review Press. 1996.

<sup>10</sup> Friedman. *Trying Hard is Not Good Enough*. Trafford Press. 2006.

**Table 1-3: How Meeting Results Lead to Neighborhood or Organizational Program Results**

<b>At the Meeting Level</b>	
<b>What did we do? (How much/many?)</b>	<b>How well did we do it?</b>
<ul style="list-style-type: none"> <li>• Number of people at the meeting who have something to contribute to improving birth outcomes</li> <li>• Length of the meeting</li> <li>• Number of clearly defined meeting results</li> </ul>	<ul style="list-style-type: none"> <li>• Number of meeting results accomplished</li> <li>• Number of people who made commitments to action</li> <li>• Percentage of participants who say their interests in attending the meeting were met</li> </ul>
<b>What difference did we make?</b> <ul style="list-style-type: none"> <li>• Percentage who say they have a new insight or understanding (knowledge)</li> <li>• Percentage who are using a common consensus decision-making method (skills)</li> <li>• Percentage who say they are more comfortable participating in discussions and speak more frequently (attitudes/behaviors)</li> <li>• Percentage who make commitments to take action (circumstance)</li> <li>• Percentage who say they kept commitments made at a prior meeting and took action outside the meeting to make a measurable contribution to a neighborhood or organizational program (circumstance)</li> </ul>	
 <p>Commitments made <i>at the meeting (What difference did we make?)</i>, can translate to actions that make a difference <i>in neighborhoods or organizations (What did we do?)</i></p>	
<b>At the Organizational or Program Population Level</b>	
<b>What did we do? (How much/many?)</b>	<b>How well did we do it?</b>
<ul style="list-style-type: none"> <li>• Number of nutrition workshops for pregnant mothers</li> <li>• Number of new mothers enrolled in home-visiting programs</li> <li>• Number of families provided with information on supporting pregnant women</li> </ul>	<ul style="list-style-type: none"> <li>• Percentage of women who said they will follow nutritional guidelines provided during nutrition workshops</li> <li>• Percentage of mothers in home-visiting programs who keep appointments</li> <li>• Percentage of eligible mothers who use vouchers to purchase healthy food</li> </ul>
<b>What difference did we make?</b> <ul style="list-style-type: none"> <li>• Percentage of pregnant mothers who know what exercise is appropriate during pregnancy (knowledge)</li> <li>• Percentage of pregnant mothers who can do exercises that prepare them for childbirth (skills)</li> <li>• Percentage of pregnant mothers motivated to exercise three times a week (attitudes/behaviors)</li> <li>• Percentage of mothers who give birth to a baby of healthy weight (circumstance)</li> </ul>	

***Meeting Results Contribute to Program Results;  
Program Results Contribute to Population Results***

If the scope and scale of neighborhood and organizational results are large enough, sufficiently effective, and aligned, then those results can contribute to community-wide results. In this example, the rate of babies born at a healthy weight in the whole population can be tracked to see if there is a gap where more contributions are needed at the neighborhood or organizational level. Addressing that gap will help achieve the overall community result of *all* babies born healthy, as measured by rate of healthy births in the community. The connections among meet-

ing results, organizational or neighborhood results, and community results are illustrated below:

### Examples of Meeting Results

- Relationships strengthened
- Partners enrolled
- Information shared
- Data analyzed
- Ideas generated and issues explored
- Solutions developed
- Decisions and commitments made



*Meeting results lead to action that produces good programs and activities in neighborhoods*

### Examples of Activities That Produce Program And Neighborhood Results

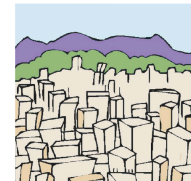
- Well-trained home visitors who help pregnant women get prenatal care in the first trimester
- Families helping pregnant women eat well and exercise
- Mothers in prenatal program deliver healthy babies



*Neighborhood and program activity results produce conditions of well-being for children, families, and adults in their communities*

### Examples of Community Results

- Healthy babies as documented by the rate of healthy births in a community population



## Differential Impact: Using MBTI Insights for Results Accountability

Using and applying the Friedman Results Accountability framework in meetings requires adopting the framework and practicing language discipline. Participant reactions to the experience of using the framework and language range from some finding it relevant and others not, some finding it easier to use and others more difficult. Results accountability may be viewed through the lens of functional pairs. The four examples below, describe what the person values, what they can contribute, and how they view results accountability. In addition, there are examples of different ways to engage each functional pair in meetings.

The **NF** (iNtuitive Feeler) takes on the role of harmonizer/catalyst and values and contributes to cordial relationships in groups. Results accountability often involves using data in the form of graphs and trend lines. It might be hard for NFs to focus on data when it doesn't seem to tell a story or reveal something meaningful about people. To more fully engage NFs:



**Encourage** NFs to imagine that all the data points of a trend line in a graph represent people's faces and stories — that the data *are* the people.

**Emphasize** that results accountability is about what people want to see in the world, and they can articulate their vision and passion about people and their wellbeing.



**Highlight** that partners are key to accomplishing results. Encourage NFs to think about who are or might be partners in accomplishing results. This approach appeals to NFs and motivates them to engage in discussions about whom to enroll in the work and how to communicate with people, especially around shared values.

**Identify** how NFs can contribute by creating the links among the people to make it apparent to all how achieving results might affect them and those they care about.

The **SF (Sensing Feeling)** takes on the role of caretaker/supporter and values supporting others. Results accountability often involves using data and objective criteria to make decisions. It might be hard for SF's to focus on the hard data and not be overly influenced by the opinions of people they care about. To more fully engage SFs:



**Encourage** SFs to use the information to devise practical solutions that will help people they care about.

**Emphasize** that working toward a common result and directly addressing differences of opinion can lead to people getting what they want and need.

**Highlight** ways that SFs can interact in a collegial way to generate solutions. This approach appeals to them and motivates them to provide support to others and receive the sympathy, recognition and support that fuels their energy.

**Identify** how SFs can contribute by ensuring that people have what they need to work well together.

An **ST (Sensing Thinking)** takes on the role of stabilizer/operational excellence champion and often value and ensure that execution steps are well defined. Results accountability often involves individuals collectively holding themselves accountable for results that are unpredictable, uncertain, and unable to be controlled by one individual or group. STs take accountability seriously, often at a personal level. As they look to achieve operational excellence, they often don't want to be accountable for things beyond their control. They also can see a lot of downside risks to strategies. To more fully engage STs:



**Encourage** STs to acknowledge the risk, contribute to figuring out how to manage the risk, and take an active role any implementation steps to optimize chances of success.

**Emphasize** that results accountability can be grounded in practical experience and/or evidence-based practice.

**Highlight** that they can help the group use a sequential process to ensure that work is organized and produces predictable, desired results.

**Identify** how ST's can contribute to the group by sharing what *has* and what *has not* worked well for them in the past; they will engage more easily in discussions with a lot of specificity and concrete examples.

An **NT (iNtuitive Thinker)** takes on the role of visionary/architect and often value and offer a big picture of how the parts make a whole. Results accountability involves taking the time to build relationships and for everyone to understand the process and the content in their own way. NTs often see the big picture and possibilities for action quickly, and, therefore, may be impatient. To more fully engage NTs:



**Encourage** NTs to see the importance of going slowly to build the partnerships and shared understanding and to focus on the simplest thing that could possibly work.

**Emphasize** that results accountability is one way for a group and NTs to envision a big picture that helps see part/whole relationships and use results accountability.

**Highlight** that taking the time to establish a common purpose and results can provide the framework for strategic, decisive action.

**Identify** how NTs can contribute by making proposals to the group about how everyone can help get the results and what sequence of actions might move the group to results.

## Theory to Competency

The practice methods are applied at the level of the 22 skills which are organized into the six competencies. Each competency can be mapped to an element of the theory as shown in Table 1-4 below.

**Table 1-4: Mapping of Theory Element to the Competency**

Theory Element	Competency
Person-Role-System Framework	Hold Role
Three RBF Hypotheses	Hold Conversation
Defining Meeting Results	Hold 3R Meetings
Differential Impact	Hold Groups
Collaborative Work Cycle	Hold Mental Models
Theory of Aligned Contributions	Hold Results

## RBF Practice Method

RBF theory is competency based and, therefore, applying the theory requires practice methods that support skill development. The following methods enable the practitioner to develop mastery by deploying skills in a variety of roles:

*In theory there is no difference between theory and practice. But in practice there is.*

– Jan L. A. van de Snepscheut

*Knowledge is of no value unless you put it into practice.*

– Anton Chekhov



Exercises to develop the skills,



Reflective practice questions to support your development,



Tips and checklists on using the skills,



Opportunities for self-assessment of your skill level,



Examples of how observing the differential impact of the use of skill, and



The opportunity to use an individual development plan (IDP) for skill building.



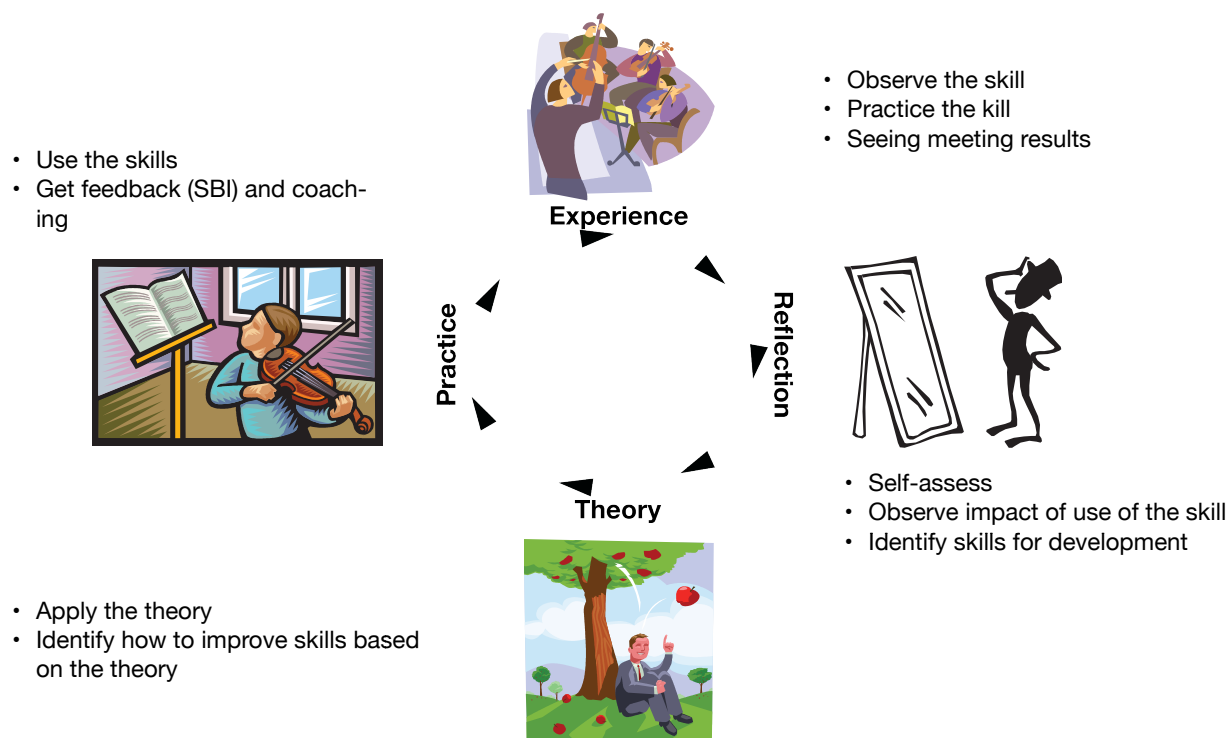
All of the above methods are useful in self-study. In addition, skill building in workshops can be supported by the use of physical objects as *meme toys*,<sup>11</sup> enactments, feedback, and coaching.

Daily practice with attention to deploying the skill with fidelity is the best predictor of skill mastery. Daily practice provides the requisite time on task<sup>12</sup> to achieve mastery.

*I hear and I forget.*  
*I see and I remember.*  
*I do and I understand.*  
 – Confucius  
*Skill comes from practice.*  
 – Chinese proverb

## The Experiential Learning Cycle

The RBF method grounds skill development in an *experiential learning cycle* that allows people to discover and learn what they need and want by reflecting on their own experiences, by seeing what their colleagues are doing, by using skills they want to learn, and by receiving feedback on and coaching for their use of a skill. Figure 1-3 maps RBF methods to the experiential learning cycle.



**Fig. 1-3: The Experiential Learning Cycle**

Skill development creates the discomfort of trying something new or doing something you already know in a new way. As you go through the experiential learning cycle, balance the *challenge* of learning with the *support* that allow you to experiment, try new things, and learn from doing. The term SBI in the figure refers to Situation Behavior Impact that is discussed later in this chapter.




<sup>11</sup> In this context a meme toy is a physical object that makes a behavior or skill easier to use in practice. It is a correlate to stress toys that many facilitators use in meetings. You can find RBF-related meme toys on the [rbl-apps.com](http://rbl-apps.com) website.

<sup>12</sup> In *Outliers*, Gladwell posits that 10,000 hours of practice are associated with mastery in a variety of disciplines.

## RBF Competency Assessment Continuum

Self-assessment is a critical step in the experiential learning cycle. The RBF competency assessment continuum makes that step conducive to practice improvement. There are three levels for each of the 22 RBF skills. These levels are described in Table 1-5.

**Table 1-5: RBF Skill Levels**

<i>Developing awareness</i> begins with an initial understanding of the concepts — and a rudimentary command of the skill. You are developing awareness when you can see <i>and name the skill</i> .		Begin by <i>seeing</i> .
<i>Applying the skill</i> involves a deeper and broader understanding of the skill and the ability to use the skill well in various situations. You are applying the skill when you can <i>do it consciously</i> .		Move to <i>doing</i> .
<i>Mastering the skill</i> occurs when you have internalized it and demonstrated the ability to consistently integrate the skill in daily work and most situations. You have mastered the skill you have made it your own, and the skill is now <i>a part of who you are, your being</i> .		Make it part of <i>your being</i> .

The practice method is grounded in self-assessment of skills. The skills are organized into the six competencies listed in Table 1-6.. Each competency is described as the ability to hold a particular skillset, behavior, or way of being and thinking. A practitioner can hold a competency when he or she can maintain a desired or accustomed level of mastery.



Self-assessment plays the dual role of creating more awareness of the skill and establishing a baseline for skill development. In the process, a series of questions are used by the practitioner to assess whether he or she is at the level of developing awareness of the skill, applying the skill, or mastering the skill.

The initial self-assessment provides a starting point or foundation for skill development and practice. By doing the assessment, the practitioner learns more about the skills, assesses the level of skill, and identifies which skills to practice.

In the initial self-assessment, the expectation is that some of the skills and competencies will be familiar, and some will not. For many practitioners, they may currently be using some of

the skills, however, they either use a different name for the skill or did not consciously consider that what they did was a named skill. As the practitioner goes through the experiential learning cycle for each of the skills, their self-assessment will become more informed and their practice more focused. Take the opportunity to experience this aspect of the practice method (self-assessment) by using the RBF Competency Assessment in Table 1-6 to do an initial self-assessment of your skill level. The colors associated with each competency in the table are repeated throughout the book as a quick visual clue.

### Reflective Practice: Self-Assessment

- ② Where have you used self-assessment to build skills?
- ② What was your reaction to doing a self-assessment using the RBF Competency Assessment in Table 1-6?



The RBF skills are sequenced to *scaffold* the experiential learning.<sup>13</sup> The assessment is a mechanism for gauging the current level of skill, receiving and giving feedback on the use of skills, and based on the current skill level identifying next steps for practice in the Individual Development Plans (IDPs).

**Table 1-6: Competency Assessment of RBF Skills**

RBF Foundation Skills and Competencies (Book One)	Skill Level/Continuum		
	Awareness	Application	Mastery
<b>Hold Roles:</b> <i>Be aware of and make choices about roles that contribute to results.</i>			
Use B/ART to define and differentiate roles in relation to meeting results			
Use B/ART to understand group dynamics and achieve meeting results			
Hold neutral facilitator role			
Give the work back to the group			
<b>Hold Conversations:</b> <i>Listen with openness, curiosity, and attentiveness to frame dialogues to achieve meeting results.</i>			
Demonstrate appreciative openness			
Use Context statements, Effective Questions, Listen Fors			
<b>Hold Groups:</b> <i>Support groups to hold focused conversations that move to results.</i>			
Flip chart to display group's work			
Sequence			
Summarize			
Synthesize			
Check-in and Check-out			
<b>Hold 3R Meetings:</b> <i>Use the 3Rs to design and facilitate meetings that move groups from talk to action.</i>			
Use the 3Rs to design the meeting			
Use the 3Rs in the meeting to get results			
<b>RBF Advanced Skills and Competencies (Book Two)</b>			
<b>Hold Mental Models:</b> <i>Use a repertoire of perspectives that contribute to results.</i>			
Use proposal-based decision-making			
Use conversations to develop convergence			
Name and address barriers to convergence			
Make and help others make action commitments			
Be and help others be accountable for action commitments			
Observe and respond to group dynamics			
Assess and address conflict			
<b>Hold Action and Results:</b> <i>Make a difference in programs and community populations.</i>			
Be accountable in role for contributions to results			
Use RBF skills to work collaboratively to accelerate progress toward results			

## The Stages of Competence

For most people, assessing their skills in a new way or in a new area of learning using unfamiliar terms can be uncomfortable, confusing, and frustrating. For example, in completing the RBF Competency Assessment, you may have discovered names for things that you did not consciously think of as skills. Or perhaps you felt validated in skills you have been practicing for years or vulnerable that you might not have mastered certain skills.

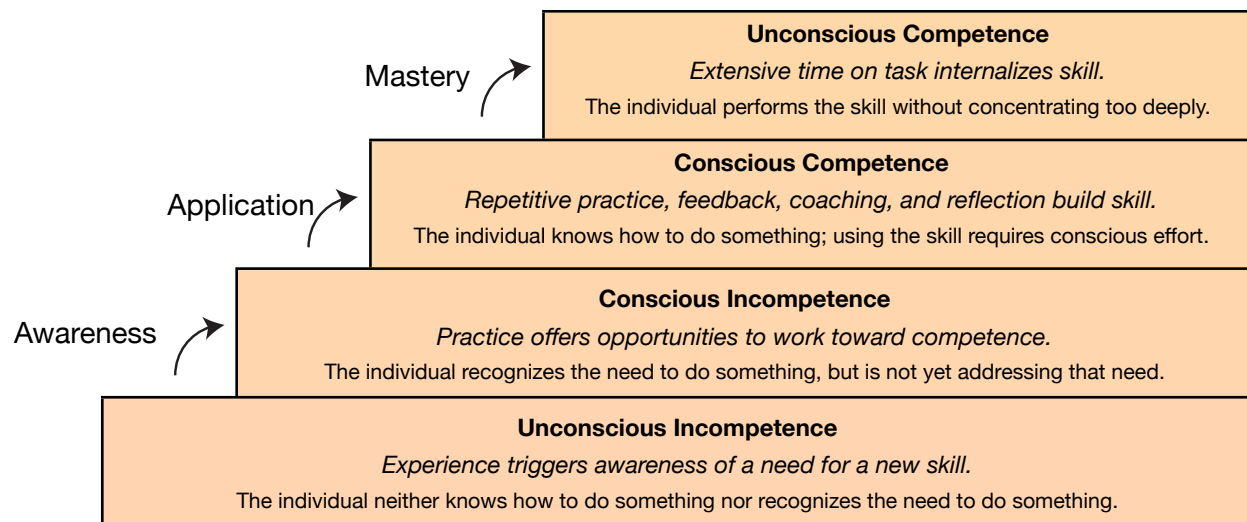


<sup>13</sup> Scaffolding the learning represents an intentional developmental sequence of learning.

The assessment process, though uncomfortable, is intended to evoke these reactions and create an awareness of where you are in your development. The *stages of competence* illustrated in Figure 1-4 describe the psychological states experienced when progressing from incompetence to competence.<sup>14</sup>

These three stages occur on the path to mastery:

1. Developing *awareness* of the skill occurs when a practitioner steps from unconscious incompetence to conscious incompetence.
2. *Application* of the skill occurs in the step from conscious incompetence to conscious competence.
3. *Mastery* of the skill occurs when the practitioner moves from conscious competence to unconscious competence.



**Fig. 1-4: The Stages of Competence**



*Our lives improve only when we take chances — and the first and most difficult risk we can take is to be honest with ourselves.*

— Walter Anderson

*Change is the end result of all true learning. Change involves three things: First, dissatisfaction with self — a felt void or need; second, a decision to change — to fill the void or need; and third, a conscious dedication to the process of growth and change — the willful act of making the change; doing something.*

— Unknown

## From Awareness to Mastery

Based on your assessment, you may have identified a skill or skills that you would like to learn. Take a moment to think about the times in your life when you discovered a new skill that you wanted to learn. Think about your experiences on the path to mastery and answer the reflective practice questions below.

<sup>14</sup> [http://en.wikipedia.org/wiki/Four\\_stages\\_of\\_competence](http://en.wikipedia.org/wiki/Four_stages_of_competence)

### Reflective Practice: Mastery

Consider a time when you mastered a new skill.

- ① What were the psychological and emotional costs and benefits of learning that skill?
- ② What helped you develop awareness of the skill?
- ③ How were you able to apply the skill or skills?
- ④ What helped you master the skill?
- ⑤ Have you maintained the skill?
- ⑥ What are some insights that might help you learn a new skill?



### Differential Impact: MBTI Learning Preferences for Skill Development

The use of MBTI supports more effective skill development and can be used as one lens for understanding differential impact, i.e., how the same behavior will have a different impact on different people. For example, MBTI makes a distinction between sensing and intuition.<sup>15</sup>



Sensors (**Ss**) are people with a preference for taking in information first through their five senses — what they actually see, hear, touch, taste, smell.

Intuitives (**Ns**) are people who first take in the big picture or symbolic meaning and may not notice specific details.

MBTI highlights differences in how people prefer to make decisions by distinguishing between two orientations: feeling and thinking.



Thinkers (**Ts**) are people with a preference for making decisions by first applying external criteria and tend to focus on logic and analysis.





Feelers (**Fs**) are people with a preference for making decisions by first considering how the decision will affect them and those they care about and tend to focus on personal values and priorities.

**Ts** and **Fs** may come to the same decision. However, they will come at it from a different perspective. **Ts** tend to focus more on impersonal facts and criteria and **Fs** focus on personal concerns and the people involved.

Table 1.7 presents an example of how using the learning styles of the four functional pairs (SF, ST, NT, NF) illuminates differential impact. The table also provides insights about how different approaches to skill building can contribute to mastery.

<sup>15</sup> Adapted from *Introduction to Type: A Guide to Understanding Your Results on the Myers-Briggs Type Indicator*. Sixth Edition by Isabel Briggs Myers. Consulting Psychologists Press, Inc.

**Table 1-7: MBTI Functional-Pair Learning Styles**

Pair	Is interested in	Learns best by	Needs	Wants from a teacher
 <b>SF</b>	Facts about real things; useful, practical information about everyday activities	Doing hands-on activities with others	Facts; straight; sequential instructions; frequent, friendly interaction; and approval	Sympathy; support; individual recognition
 <b>NF</b>	New ideas about how to understand people; symbolic and metaphorical activities	Imagining and/or creating with others; writing	General direction, with freedom to do it their own creative way; frequent positive feedback	To sense and share warmth, enthusiasm, humor; individual recognition
 <b>ST</b>	Useful, practical information about how to do things well	Putting ideas into practice	Precise, step-by-step instructions; logical presentation backed by solid facts	To be treated fairly
 <b>NT</b>	Theories and global explanations about why the world works the way it does	Categorizing, analyzing, applying logic	A big problem to solve or an intellectual challenge, and then to be allowed to work it out	To be treated with respect; to respect the teacher's competence

**Reflective Practice: Learning Style**

- ② What is your learning style?
- ② How can you use your awareness of your own learning style to accelerate your skill development?
- ② How is your learning style different from or to similar from others?
- ② How might your awareness of similarity and difference influence how you work with others?



## Feedback and Coaching Support Skill Development

The primary practice method for skill development in the experiential learning cycle is to receive feedback and coaching. RBF makes a distinction between feedback and coaching. Further, RBF provides a specific method of giving and receiving feedback to accelerate skill development. The specific feedback method is called *situation, behavior, impact* or SBI<sup>16</sup>. The following section defines feedback, SBI, and coaching.

### RBF Feedback

*Feedback* is information about behavior that is given in the present so that it may influence the way people behave in the future. Here are some important points to remember about feedback:



Advice is not feedback. *Advice* is an opinion that is offered as something that is worthy to be followed, i.e., counsel. Usually advice is about “shoulds.” Advice is often unsolicited, unappreciated, and ignored.

- ✓ Feedback is about observation.
- ✓ Feedback is timely.
- ✓ Feedback is specific.
- ✓ Feedback includes the impact created, e.g., reactions and perceptions.
- ✓ Feedback describes but does not judge.

<sup>16</sup> A description of the more general use of SBI, as originally developed by the Center for Creative Leadership, can be found at [www.ccl.org/leadership/pdf/community/SBIJOBALD.pdf](http://www.ccl.org/leadership/pdf/community/SBIJOBALD.pdf).

- ✓ Feedback is different from criticism or praise — it is not evaluative.

*feedback*: “When you started the meeting, the question on the chart was clearly written, but when you read the question your voice was low and I couldn’t hear you.”

*criticism*: “You communicated poorly.”

*praise*: “You communicated well.”

*Feedback* involves giving information that can be helpful to the people receiving the feedback. It helps them make choices about their own performance without telling them what to do.

*Receiving feedback* is best done by focusing on hearing it clearly, expressing appreciation for the information, then giving yourself time to process what you have heard before you choose what to do with the information.

In receiving feedback, do not try to explain what you were trying to do or why — accept the feedback as it is offered. Keep in mind that the observation and information from one person’s feedback reflects differential impact. Two people experiencing the same behavior from you may react differently. With this awareness of differential impact, you can choose how to use or not use the feedback to inform your practice and development.

### ***SBI: A Model of Constructive Feedback***

To develop RBF skills you will use a specific method of feedback — *Situation, Behavior, Impact* (SBI) — to provide feedback to others and to request feedback from others. SBI provides information about the impact of the behaviors associated with the use of RBF skills. SBI focuses the practice on skill improvement and illuminates differential impact.

#### **S Describe the Situation**

Specify the situation in which the behavior occurred. Describe when and where the behavior occurred. The more specific details you can use in bringing the situation to mind, the clearer your feedback will be.

**Example:** “When you turned your back in order to flip chart during the discussion on norms ...”

**Not:** “When you were facilitating ...”

#### **B Describe the Behavior (Not an Interpretation of That Behavior)**

Behavior is a person’s action; behavior is described using verbs (action words).

**Example:** “You lost eye contact with the group for several minutes.”

**Not:** “Turning your back was poor practice.”

#### **I Describe the Impact the Other Person’s Behavior Had on You**

Impact statements offer candid (authentic, accurate) feedback of your emotional response and how that emotion affected your participation in the conversation.

**Example:** “When you turned your back in order to flip chart during the discussion on norms, you lost eye contact with the group for several seconds. During that time, everyone was speaking at once, and I couldn’t figure out how to get my voice heard. It made me feel unappreciated and I withdrew from the conversation.”

**Not:** “The conversation fell apart.”



## SBI Practice Method

The practice method that accelerates the development of RBF skills is as follows:

- ✓ Skill practice followed by appreciative self-assessment.
- ✓ Feedback using SBI shared by those who experienced the skill practice.
- ✓ In hearing SBI about one's practice, the intent is to listen deeply and not question or contest the feedback, rather use it to develop greater awareness of differential impact.

The following is an example of how the SBI practice method can illuminate differential impact of the same behavior on two different participants:

**Situation:** When you were checking to see who wanted to speak at the beginning of the meeting

**Behavior:** You said to Ann *"You haven't raised your hand, however, I may be reading something from your expression — do you want to speak?"*

Impact statement from Ann: *"I appreciated being asked, I realized I did have something to say and was comfortable saying it."*

Impact statement from another participant: *"I got concerned when you asked Ann if she wanted to speak, I wasn't ready to share and was anxious you would also ask me."*

## SBI Feedback

The following is the form used to provide SBI feedback in RBF workshops. It is also appropriate for use in coaching and peer feedback environments.

<b>Facilitator observed:</b> _____	<b>Date/Time:</b> _____
<b>Your name:</b> _____	<b>MBTI type:</b> _____
<b>Your Role during the Facilitation*:</b> _____	
<b>Situation</b> (when and where):  	
<b>Behavior</b> (specific description of what you observed the facilitator say or do):  	
<b>Impact</b> (the impact on you in role: what you felt or thought in response to the situation and behavior of the facilitator and how it affected your participation):  	
<small>* The role you have in a group or in relation to the other group members and/or the facilitator informs how you experience another person's behavior. For example, when in a supervisor role, you may be more sensitive to behavior that might challenge your authority than when you are in a peer role.</small>	



## RBF Coaching

RBF coaching is specific to the RBF skills and is only done with permission from the person receiving the coaching. Coaching supplements self-assessment and SBI to accelerate skill building. Coaching is best done by those who have reached mastery in the RBF skills and have experience using the RBF coaching approach and practice methods.



RBF coaching is about challenging *and* supporting people, giving them the gift of the coach's attention and focusing on their skill development. Coaching requires the person being coached to give permission for the coach to interrupt, intervene, and provide specific guidance and methods of practice. Coaching is about behaviors and is up-close and personal, sharing observation and guidance about voice, body, affect, and specific skills. RBF coaching uses assessment and interaction to support behavior change and can include labeling, inquiry, dialogue, direct instruction, and behavior modeling (by the coach).<sup>17</sup>

*What you do speaks so loudly that I cannot hear what you say.*

– Ralph Waldo Emerson

### The Coaching Model as Applied to RBF Skill Building

The RBF coach listens and observes. He or she focuses on specific skills and how the skills are used (message and medium). The coach contrasts what is being observed with the ideal of what the skill looks like at the mastery level. This is sometimes called the coach's point of view.

The coach provides opportunities for reflection to create awareness of what changes are needed to build the skill. The coach also provides positive feedback on changes in behavior in the use of the skill. He or she provides direct instruction, models the skill, and encourages skill practice.

Even if you do not have access to a qualified RBF coach, you can solicit SBI feedback in written or oral form from coworkers or meeting participants. You can also observe the impact of your skills to guide your practice and skill development.

### Competency and Skill-Building Chapters

The RBF practice method is incorporated in each of the skill building chapters. Each chapter includes an introduction to the competencies and skills, skill assessment questions, exercises for developing the skills at each level, a practitioner's practice guide to support day-to-day skill practice, and an opportunity commit to your next steps of skill development. The practice method begins with assessing your current skill level at one of three levels:



1. Developing awareness of the skill (know).



2. Application of the skill (do)



3. Mastery of the skill — internalizing it until it becomes part of who you are, your being (be).

<sup>17</sup> Pillsbury. *RBF Coaching*. Sherbrooke Consulting, Inc. 2009.

Each of the skills discussed in this book has three levels of mastery. Table 1-8 shows an example of a skill in the Hold Groups competency. For each skill level there is a statement describing what that skill at that level looks like, followed by questions to help you self-assess. The dotted arrow below the description can be used to mark your progress along the continuum.


### Table 1-8: Self-assessment – Skill of Synthesizing

Awareness	Application	Mastery
<p>Briefly states the meaning of short conversations.</p> <hr/> <ul style="list-style-type: none"> <li>Do I listen for the central meaning of the conversation and state that concisely?</li> <li>Do I use basic methods of synthesis (comparison, themes, part/whole connections) in listening for and concisely stating where the group is in its work?</li> </ul>	<p>Integrates and briefly states the meaning for a number of conversations or longer conversations.</p> <hr/> <ul style="list-style-type: none"> <li>Does the group affirm my synthesis and use it to move forward to meeting results?</li> <li>Do I use imagery and symbolism to help groups grasp the meaning of an entire meeting?</li> </ul>	<p>Integrates and briefly states the meaning for a whole meeting.</p> <hr/> <ul style="list-style-type: none"> <li>Does my synthesis accelerate the group's work?</li> <li>Does the group use my synthesis to move to action?</li> </ul>

## Participant Practice Guides: Building Mastery Through Daily Practice

Developing skill mastery requires intention and repetitive practice. Most people spend more time in meetings as participants than as facilitators. The Participant Practice Guides are provided for each skill and give examples of how to deploy RBF skills when you are participating in meetings. The guides give examples that range from no risk to high risk as shown in the example in Table 1-9. The no and low risk uses of the skill are appropriate when you are initially developing your comfort and confidence in using the skill. As you become more comfortable, confident, and experienced in deploying the RBF skills, the medium to high risk examples may be something you will be able to do. As you use the skills daily, what might be high risk today may be low risk tomorrow.

### Table 1-9: Participant Practice Guide— Skill of Synthesizing


 Participant Practice Guide	No Risk	Low Risk	Medium Risk	High Risk
	Before speaking, consider the essence of what you want to communicate, then practice expressing the heart of the matter briefly (in less than a minute).	In a meeting, listen for the parts and hypothesize about what the parts add up to. Share your hypothesis with the group.	Offer to chart a conversation in a way that captures the parts as a whole. Check with the group to see if it is helpful in moving the group forward.	Offer a synthesis of a difficult or confusing conversation that sharpens the group's awareness of an unaddressed issue (elephant in the room) or an implicit assumption.

As a participant you can use all the RBF skills. In addition to the Participant Practice Guides, the exercises and tips provided for each skill can be used to strengthen your skills in the participant role.

## Skill Building: Using an Individual Development Plan





This book uses the *Individual Development Plan* (IDP) to support skill development. The IDP enables the practitioner to choose the specific skills to develop, and then decide what to practice and how. Table 1-10 shows an example of an IDP for the skill of flip charting in the Hold Groups competency. An IDP for each competency can be found in Appendix A.

**Table 1-10: Sample IDP for the Skill of Flip Charting**

Skill/Present level	What will I practice to build skill?	Where and how will I practice daily?	What is the desired impact of improving the skill?	
Charting - my handwriting is not legible	The formation and spacing of letters	Place a flip chart in my office to chart key decision from conversations with supervisees, pay attention to using the flat edge of the marker and making the letter 2.5 inches high	My subordinates will be able to easily read the decisions and we will refer to them to ensure execution.  I will both observe the impact of my charting and request SBI from my subordinates about the usefulness of my charting.	

Your skill assessment points to the skills that need strengthening. To accelerate development, the IDP encourages skill repetition and integration of practice into daily work. The IDP encourages you to design your daily skill practice to build mastery. Part of the development of the skill includes being clear about the desired impact of the higher skill level. By specifying the desired impact you are positioned to use your practice experiences to assess your progress and continue towards mastery.

MBTI learning preferences illuminate differential impact and provide insight about how and what might be helpful in creating the IDP. For example:

-  **SF (Sensing Feeler)** might consider whom they would enjoy working with, and reach out to him or her to get encouragement and supportive feedback while practicing the skills.
-  **NF (iNtuitive Feeler)** might consider how RBF contributes to an understanding of people. Then the NF would use person-role-system framework as a starting point for practice;
-  **ST (Sensing Thinker)** might consider the practical benefits of using a skill, choosing one, such as appreciative openness, and taking specific steps to develop that skill.
-  **NT (iNtuitive Thinker)** might want to first review the theory of RBF and understand the “why” of the competencies as preparation for practice.