Design Pattern Worksheet

Name of this Design Pattern: Designing a ToP Facilitated Event

Script

Context

I need to understand what you need in order to design a process to help you get the results you need. Why don't we start with the background of this situation?

Procedures

Why don't you start by giving me the background leading up to this meeting.

General flow, probing where necessary:

What led up to this request?
What are the results you need at the end of this event?
Who is involved? Who has a stake in the results?

How will you use these results in the future?
How do these fit into your larger work?

What is the state of the people involved?
What do they need to be like at the end of the session?
How much time do we have to do this? Other constraints?

Summarize what you've heard about the rational and experiential aims the client intends and test them with the client.
Try to formulate the "one question" that the client needs to answer, and run it past them to adjust it.

(The next part is in your own head: often the very first draft is while you are in the client meeting, but tell them this is subject to revision as you think about it seriously when you do the detailed preparation.)

Listen to all of this information, compare it to previous situations you've facilitated (or have seen).
Compare it to a deep ORID structure – how the journey can move from surface to depth.
Run this past a database of methods in my head (or written down).
Draw a time model framework, i.e. a symphony planning sheet for a half-day session, or time blocks for a 2 or 3-day session, etc.
Plot pieces of topic and method into the time framework, holding it against the ORID journey during each time block and the rational and experiential aims. Create and check rational and experiential aims for each time block.
Bounce this back to the client, using an agenda format if they don't understand the visual format, and adjust.

Using this design pattern in a face to face environment	
Group Size	Best if more than one person, representing a diverse cross-section of people responsible for the results. Usually not more than 5-6 people. Perhaps a "steering committee".
Space needs	A small table, preferable round, a flipchart. Can be a client office or a boardroom.
Timeframe	Usually about an hour.
Atmosphere	Thoughtful and serious.
Preparation	Usually a phone call from the client. Rehearsing the questions.
Challenges	Clients do not necessarily know what the facilitator needs to know, and may give too much or too little information. Client may have a process in mind rather than the result they need. Jargon may need to be interpreted. Temptation to propose "tried and true" or favourite constructs without thinking carefully about what the client and the participants really need.
Ground Rules	The client is in charge: the facilitator listens. Working Assumptions
Tips	Use a worksheet with some comprehensive backup questions. Don't jump too quickly to your favourite solutions or processes.
Modifications	If the "steering committee" is more than a dozen people, use a consensus workshop on "What results do you need from this event?" to come up with the key results, then turn them into the rational and experiential aims. A focus question worksheet can be used for a very short, simple event, and the group can help come up with the overall focus question before the design. Use a symphony session planning form for a half-day session, or a time grid for a longer session.
Example	Meeting with Mississauga City Planning. There were four people present. They have a mandate to do public consultation, with some legal requirements and restrictions. I used the design eye to take notes and to ask questions, and then to draw my tentative design. We then booked the tentative dates, and several days later, after thinking about the design further, I sent them the agendas.

Using this design pattern in a virtual environment	
Virtual Tools	Teleconference, or tool like Elluminate or Adobe Connect with whiteboards.
Modifications	Using the "design eye" worksheet can help the client visualize where you are going with your questioning. If you are using a whiteboard where you can upload a template and people can write on it, you can have them write answers as well as answer them verbally. This can be followed with a time design template like the symphony session plan. For a very short, simple session, the focus question worksheet may be used.
Group Size	Fewer than 10: 3 or so is probably best.
Timeframe	An hour or less
Ground Rules	Working Assumptions
Preparation	For a teleconference, send out the design eye worksheet (or the focus question worksheet) in advance, so people can have a common visual to take notes on. For Elluminate and Adobe Connect, prepare the worksheets and upload them.
Challenges	Making sure everyone has a chance to speak before things start to jell, so that you have the whole picture before you start to design.
Tips	Letting people write answers in each box will save time, but you will need to have a record of their longer verbal answers.
Example	Sheila, Sunny, and Jo did a redesign of the IAF session, using the focus question worksheet and a diagram of the time design.

Virtual Script	
Pre-event preparation	Create your detailed script and the tools you will need for each part of it. Rehearse the questions, thinking through what you will need to know for this particular situation.
Technology Introduction	Do a "sandbox", playing with the tools
Context	I need to understand what you need in order to design a process to help you get the results you need. Why don't we start with the background of this situation?
Script	Why don't you start by giving me the background leading up to this meeting. General flow, probing where necessary: What led up to this request? What are the results you need at the end of this event? Who is involved? Who has a stake in the results? How will you use these results in the future? How do these fit into your larger work? What is the state of the people involved? What do they need to be like at the end of the session? How much time do we have to do this? Other constraints? Summarize what you've heard about the rational and experiential aims the client intends and test them with the client. Try to formulate the "one question" that the client needs to answer, and run it past them to adjust it. (The next part is in your own head: if the very first draft is in the client meeting, tell them this is subject to revision as you think about it seriously when I do the detailed preparation.) Listen to all of this information, compare it to previous situations you've facilitated (or have seen). Compare it to the deep ORID structure – how the journey can move from surface to depth. Run this past a "database" of methods in your head (or written down). Draw a time model framework, i.e. a symphony planning sheet for a half-day session, or time blocks for a 2 or 3-day session, etc.

	Plot pieces of topic and method into the time framework, holding it against the ORID journey during each time block and the rational and experiential aims. Also create and check rational and experiential aims for each time block. Use an agenda format if they don't understand the visual format, and adjust.

The Big Picture	
Name	Designing a ToP Facilitated Event
Overview	This is the conversation with the client that elicits the necessary information about what is needed, and creates the process that will accomplish it.
Metaphor	Design Eye
Graphic	
Intent	To understand deeply what the client needs, including the transformation needed by the group, and to design a process that will move smoothly through the thinking process.
Level of thinking	O, R, I, and D.
Pattern of Collaboration	Listening to narrative, then gestalt of patterns to discern needs, then a scan of tools and gestalt to apply tools to needs
Role	Process consultant
Best uses	Preparation of any session
Do not use	