

Design Guidelines.

My friend Larry Butler suggested that I might write a guideline on how to design an exercise. My first reaction was, no, I want people to do that themselves. In fact I say exactly that at the end of the second article in this section.

Then I couldn't keep it out of my mind, and I realised that the whole issue is actually much more difficult and interesting than I had at first thought. Well, I've been doing it on and off for decades so it's become part of my second nature. But now I'm going to try and take it apart.

One important issue: an exercise is never an isolated event. It will be part of a whole learning event, a workshop, conference, group meeting - so it becomes difficult to make simple rules.

I thought it would be useful to list some of the factors.

So here goes.

Who is the Client? Is it the Boss of an organisation or a team, is it the manager of a work-team, is it a self-organising peer-group, is it a couple or family? The importance of being very clear about this is that the client, or clients, will have wants. So:

What is wanted by the client? And:

What do I want for the client? And:

What are the clients needs?

The issue of wants (or '**goals**' as they are usually more respectably called) and **needs** is touched on at the start of the article 'Design And Politics', the third of the articles in this section. Goals and needs may not be the same. And important for our purpose here are these two further issues:

How far is it possible to **talk with the client openly** and calmly and rationally about this?

And very important: Are the wants and needs of the 'client' and the 'participants' **the same**?

Another way to look at this is what is the **relationship between client(s) and participants**? This applies at every level of size. A couple may have come because one of them has pushed it. A boss may be wanting to push his management into shape (*his* shape). Or - he may be wanting to turn his company into a co-operative! It has happened.

So now the question arises: **What do you know about the set-up** you are being asked to work with? To what extent is it possible to **explore, get to know this set-up** in advance of the learning event? (Or, ideally, in advance of making a contract, of agreeing to do it)?

Actually I don't think it's possible to 'write a guideline on how to design an exercise', (which is how my friend in a no doubt quickly-composed-email put his request), without considering all of the above as relevant. And a lot more!

So here goes again!

What are the resources? Of space, of time? Of skills and expertise amongst participants in the group or workshop or conference? Is there a budget for an outside expert?

How well do the participants know each other? Is this a group that already works together?

Once in the learning space: **what do the participants want, expect, fear, need?** What will they be reluctant to be open about?

And what about me, us, the facilitator(s)? What a significant word that is. From the Latin 'to make easy'. And the English word Facile has the connotation of being avoidingly over-simple.

My job is to set up an image of a real-life situation which in some way illuminates it to advantage, creates new relevant insight, new skill even. And how I respond to people has to be considered, and will of course vary hugely depending on person, situation and so on. Do I: **Listen? Repeat back** (a la Carl Rogers)? **Question? Advise? Give voice to my own reaction** (am I aware of it even?) **Allow myself to enact a part that people are attempting to involve me in?** (Am I aware of that even?) Of course I am aware of it, **I have to be** if I'm going to do my job properly.

All of the above, every bit of it, is part of what goes into the designing of an exercise - or any learning event which uses the experience of the event to create a positive effect.

All of the above needs to be in our awareness before we can even make sense of more immediate questions. By more immediate I mean:

What will be the **arrangement in space of people** - whether from the physical needs of the space or the learning needs of the event.

What size will **sub-groupings** be? And how will they be **selected**? Will the sub-groupings have co-facilitators or be **leaderless**? Will they have the purpose of a place where people get to know each other on a more **personal, supportive** level, or will they be groupings where **tasks** are done? Will the groupings meet and **report to each other**? All of these features actually are embodied in the so-called 'Danish Design' described in the first of the three articles in this section.

What **tasks** will be **set**? Will the event, or the exercise, be **run** by a facilitator? Use **simple, well-known formulae, like the go-round** - useful for all sorts of things, getting to know each other, giving information, providing views and suggestions and feedback, doing little acts or exercises...

So now about the specificity of an exercise. We have to consider its **purpose**. What is it designed to **evoke, or reproduce, or reveal, or provide as an experience**? There are some examples in the first two of the articles. These are mainly based on theatre exercises - partly because theatre exercises are often simple. But also because theatre is an **image of reality**, and this is what an exercise also has to be.

But simplicity itself is a fruitful example. Try for the **simple**. Don't strive for the 'light-bulb' experience. I believe you are more likely to achieve this through simplicity and precision. None-the-less, **don't hesitate** to devise a life-rehearsing image just because it is **complex**. So long as it is **truthful** as an image, people will be engaged in it and rise to the challenge.

So consider always: **purpose; image; -- and dynamic**. What is the purpose of this exercise? Will it help communication? Will it enable more creativity? Etcetera. There are of course many etceteras. It is useful to think of purpose in terms of **skills and awareness**.

What 'real-life' image does this exercise represent? An image of an existing set-up? An image of **possible change**? And as for dynamic: well, most exercises will have some dynamic effect on the group or groupings or individuals within it: greater honesty, or excitement, curiosity, or boredom, or closeness, or hostility - even at the extreme to the breaking up of the group.

One area of exercises I have not considered is that for individuals. A mindfulness exercise is essentially for an individual. Counting one's breaths, being aware of areas of tension in the body, relating to, dealing with, fears or unwanted thoughts. Noticing one's reaction to strangers in a bus. There are quite a lot of books around this area; and such exercises are often set for oneself. They merge also, I suppose, with therapy. But then, what is 'therapy', in the broadest sense?

And finally - well, there probably isn't a finally, I hope this 'guideline' is helpful, but finally: Consider the level of **difficulty**, of **challenge** of any exercise or situation you set, and whether it meets the approximate level of ability, knowledge, experience, (so far as you can judge, and it is part of your job to get skilled at making this kind of judgement) of the people you are asking to do it. It should not be too easy, and it should not be too difficult. Too easy will be pointless - and get you looked down at; and too difficult will be paralysing, and not be useful as a learning tool by this group of people.

Well, not quite finally - here's something else. Try to find your own learning situations where you **yourself can experience things you are going to set**. The best facilitators have always (I don't think that is too strong a way to put it) experienced what they are asking other people to experience.

And in inventing any exercise or situation - be as precise as you can in your mind as to what you are setting out to do; and be very precise in presenting the **instructions** (see as example the 'hat exercise', and others too, in the second article). But don't engage in explaining the outcome, what 'ought to happen'. If you follow these guidelines, what ought to happen will become apparent!

Here is my exercise for you now. Write your own guidelines. And some exercises.

Those are my guidelines. Good Luck.

More!

Read on:

Extra!

After writing the above, I turned up this by chance (well I'm doing a lot of sorting and clearing), written when? but long ago - it seems to me quite useful and, although some of it is a repetition in different words, I thought I would copy and add it.

THE EXERCISE

Analogy - (in the account above I have called this 'image' - also in the articles 'Exercises' and 'Design and Politics' in this section.)

An exercise acts as an image, or analogy, for a real-life situation (ie a situation outside the exercise), and we can practise for the reality inside the image.

New Awareness

An exercise can provide us with some new, or at an rate high-lighted, responses. The new awareness may be simply that we are not doing something well. For example, a listening exercise may show us that we are poor listeners. Or it may give us a new experience of how it feels when we listen better.

Skill

An exercise should go further than providing an awareness and should provide scope for practise at or with a new skill - such as listening. It often does this for more than one skill, but we should be clear what particular skill we are setting it for.

(Listening without imposing ones own thoughts and projections; expressing feelings; confronting; remaining within ones own emotional space; setting objectives; making decisions; having ideas; validating; not-planning - all of these can usefully be thought of as skills for the purpose of designing or analysing an exercise. They are, of course, only examples.)

(Note that in the account above I have referred to Skills and Awareness jointly as Purpose).

'Readiness'

Clearly a participant may have blocks to a new awareness. This often relates to the state of 'readiness' - (above I have referred to this as the level of difficulty or challenge). And having or learning a skill doesn't necessarily mean that it will be transferred or used when it is needed. This relates to a wider integration of how we are.

Dynamic effect

Finally, an exercise has a dynamic effect on the people doing it or their their interaction. Thus, a listening exercise usually increases the closeness and the climate of support in a group. This dynamic effect of an exercise is very important and should always be considered in relation to the overall dynamic of a group. (The same applies to a pair, as to an organisation). For example, in a group which is going through a phase of focussing on control issues there is often very little good listening going on. But to do a listening exercise at this period would be pointless. In fact it would be likely to slow up the resolution of control issues by imposing rules on the group which were blocking to what it needed to do.

To use an exercise, or to devise a new one or a modification of an existing on, we need to look at all these aspects.

What awareness and what skills would be helpful for these people at this point? What awareness and what skills does this exercise provide?

What basic dynamic is going on in this group, what essential issues are around? What dynamic effect is this exercise going to have?

What is this exercise an image or an analogy for, in a wider context (ie outside the group, and also inside the group outside this exercise - both, if possible, for the most fruitful results)? To what situations will people be wanting to transfer what they learn?

And still more!

Read on again!

Sorry! - keep finding more (from sometime back) that I think is relevant.

The so-called Client.

Who Is The Client?

Conventional teaching has it that, in working with an organisation, we need to be clear 'Who is the client?'

True enough, it's an important question. The impulse for initiating a consultation process usually comes from a particular person; or a particular part of the organisation: and the initial contact will be made through an individual who may be that person or may represent that part of the organisation. And this is useful information. And it may be (it often is) that one has been hired by that person for a particular purpose. And it may sometimes turn out that one is fired by that person for not committing to that purpose.

'Who is the client?' is a starting point - and it is the starting point that is often regarded as the decisive issue in a consultant's responsibility. And indeed it is the consultant's responsibility.

But we need to really consider the question 'To whom is my responsibility?' And as soon as we start to do so, then to regard that person or that part of the organisation as the answer is entirely simplistic.

'Who is the client?' has many meanings. It could relate to any of the following.

1. Who is the person who first established contact?
2. Who is the person (same or different) who gave a brief?
3. Who pays the money?
4. Who has the power to accept or decline interventions? (Or to sack me).
5. Who are the people with whom one is able to communicate?
6. Ultimately, my responsibility as a consultant is to the organisation as a whole: to its well-being, and to as many of those who work in it as possible.

(6a. In the case that an organisation is breaking up - then my responsibility is still to both or all of the parts that it is breaking up into. Until one or more of those parts decides to say 'we don't want you any more' - or else 'we don't want you to work with the other part any more', which then requires some kind of decision from me).
7. Even more ultimately, my responsibility is to the whole context within which the organisation lives and breathes - partly because the whole context needs to be related to as a total system; and partly because relating to it is essential to the viability of the organisation.

(7a. If we consider an extreme case, that of individual therapy, then it is still true to say that the whole context of that individual, inside and out, past and future, needs to be related to in an ultimate sense).
8. My responsibility to the 'client', in the formal narrow sense of that term, is: to enable him or her to relate to their responsibility to the organisation as a whole and as many of those who work in it as possible. My responsibility to the 'client' can only be a starting point in doing this job.
9. My responsibility to the organisation is to enable it to become conscious of its own functioning, and how this is its own responsibility and all of those in it.
10. Ultimately, the client is, and always has to be, the whole system: whatever the point of entry has been, and whatever pressure that point of entry, or any other part of the system, attempts to apply
11. The most difficult part of the consulting task (and in my view the most interesting, the most challenging, the most rewarding and ultimately the most essential) is to be able to perceive the different parts of the system; and to enable all of them to become conscious of the whole.