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Facilitating Big-Picture Thinking: Taking Boards Beyond the Mundane

By Terrie Temkin

My fifteen-year consulting career has been focused on board governance and planning in the nonprofit sector. From day one, the key challenge has been in helping board members see beyond day-to-day operations and getting them, instead, to look at the strategic issues that keep their organizations relevant in a changing environment. This is true whether charged with facilitating monthly board meetings, committee meetings, or board retreats.

There are a number of reasons why boards and committees shy away from big picture thinking. Among them: The post-Sarbanes-Oxley emphasis on fiduciary responsibility has people (mistakenly) counting paper clips.

The trend toward the reduction in the number of meetings per year means longer agendas when boards or committees do meet, and less time available for in-depth discussions of anything on the agenda, let alone the big picture.

The lack of sufficient board education has decision-makers bereft of the foundation to intelligently discuss the future. And, there appears to be something about the human DNA that is resistant to change and is coded instead to cling to the way business has always been done.

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However, these realities make it all the more important that when these groups *do* meet, the focus is on the big picture. After all, it is they that bring to the table the breadth of perception and experience that are essential to strategic thinking; and it is strategic thinking that leads to the work-arounds for successfully moving beyond the obstacles noted above.

Defining Success. So, how do we as facilitators get people to break out of that proverbial box? There are many methods, only a few of which is there room to write about here. However, as any trained facilitator knows, it is never about the method, but the desired result.

If the result doesn't help your group envision the better future it wants for its community or doesn't solve its problem, it's been a waste of time, effort and usually money. You must begin by leading people through an exercise to determine their criteria for success.

For example, a group that wishes to institute a membership program might determine that a successful program will result in a minimum of 500 new members by the end of the fiscal year, that these new members will come from at least 35 of the 50 states, and that at least a third of these members will be under the age of 40. But these measureable indicators should never be pulled out of a hat.

You want to be sure that they are based on the group's evaluation of such strategic issues as mission, stakeholder needs and desires, cost, potential, image, risk, staffing, competition and where the organization is in its life cycle.

I find most groups want to jump ahead to immediately start talking about action steps or solutions. Our group with the membership issue might say that it will design a national advertising campaign. But the most fabulous campaign is worthless if it doesn't bring in young people from all over the country in large numbers or if you get the numbers but the new members end up costing you more than they are worth either in dollars and cents or the image they project.

I am constantly reminded that one of the most important roles we as facilitators can play is to be sure the groups with which we work have specified strategic indicators of success before we let them loose to talk about how they intend to proceed.

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Thinking Outside Our Comfort Zone. A phrase that has wormed its way into the international psyche is "Same old, same old." Unfortunately, we frequently see the manifestation of that phrase when we facilitate problem-solving or visioning sessions and people latch onto the first idea put forth.

This is often an idea that has – or could have – been put forth at numerous other non-profits. The idea may *feel* right because it is comfortable. But, all too often, it is adequate at best, and more likely tired and ineffective. With a little more work the group could come up with an exceptional idea.

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Again, it is our job as facilitators to encourage big-picture thinking along lines that lead to the generation of multiple creative options that meet the client's success criteria. Only then can the client have the best shot at choosing an effective solution or approach.

Staying Strategic. Focusing on "What if…," "What are the ramifications of…" and "How will this affect…" type questions is essential for staying big picture. If you employ group discussion to generate answers to these questions around the issues at hand, you might appoint a "Strategy Monitor." That person's role for the duration of the session is to pull the group back if it starts to move into the fiduciary or operations realm.

Piggy-Backing One-on-One. Understanding that group discussion often excludes the quiet individuals or those who need time to think through their answers, you can give people time to write out their thoughts on the issues. If you adopt this technique, you might then ask everyone to hand their papers to the person to the right of them. The recipient is to jot down his or her thoughts on what is on the paper. If the content is not strategic, what would the recipient suggest doing differently to make it strategic?

Can the recipient piggy-back on any of the ideas listed? If so, he or she should. After about four minutes the paper should be passed to the person to the left of the originator and the process begins again. This time, responses are to focus not only on the original ideas but those of the first commentator as well.

When the time is up, go around the room and ask for an idea from each person. Continue going around the room until all the unique ideas are on the table. This exercise will provide multiple options for consideration that to some degree have already been vetted.

Solutions - Speed Dating Style. Another technique I've found effective for tapping into multiple options relies on speed to get people focused on solutions to problems. Break the participants into small groups of four to six. Provide each group with a stack of unique-colored note cards – i.e., one group might get a stack of green cards, another group a stack of pink.

There should be one more card in each stack than there are groups. Put a "Q" on one card and an "A" on all the others in each stack. Ask each group to take no more than three minutes to come up with a key question or a problem to which they would like an answer, and write that on the card marked with the "Q." At the end of the three minutes, ask each group to pass their stack of cards to the group to their right.

Give the groups two minutes to write on one of the "A" cards their answer(s) to the question they have before them. When the two minutes are up, the groups switch stacks again and the process is repeated until each group gets its original stack back.

Without even setting it up, a sense of competition tends to emerge. Between this and the speed at which this exercise plays out, people focus intently on their answers. And, because of the multiple groups to which the questions are presented, there are multiple answers from among which to determine what might work best for the organization. Obviously, any organization that is looking to make strategic decisions will want to flesh out the responses they get through an exercise of this

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sort and compare them against the criteria for success, but this technique does get the creative juices flowing.

The Stakeholder's hat. To get the creative juices flowing toward the solution of a problem you might also break the participants up into small groups and ask each group to put on the hat of a different stakeholder group – e.g., client, staff, funder, vendor, community leader, direct-service volunteer, donor or board member. Their task is to tackle the problem from "their constituency's" perspective.

Each group should bring up the questions, concerns and potential solutions their stakeholder group would likely raise. This is an effective way for organizations to consider the issues of interest to, and the impact of their decisions on, the greater community.

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Cafes. *World Café* and its variant techniques allow stakeholder groups to have their say on strategic direction, important questions or serious problems facing an organization. Both put small groups – three to five people – around tables in a comfortable café-like setting, often supplemented with music, flowers or candles and refreshments. The tables should be covered with large pieces of newsprint and the participants provided with crayons and other art supplies.

Each table focuses on a single, well-considered question. As people discuss their thoughts, they are asked to record them along with any random thoughts onto the newsprint, using words, pictures, symbols or doodles.

World Café is a fairly structured technique. After a defined time – generally 20 – 45 minutes – one person is asked to remain at the table and serve as host. The others are asked to split up and move to a table with all new people. Once everyone is settled, the host at each table opens the round of discussion by explaining the essence of what was said previously. The others may chime in with related threads of conversation from their original table discussions. From there, the conversations drill down, expand or take off in new directions based on the change in group dynamics. There are typically three or four rounds.

A variation on the World Cafe enables people to move at any time to get in on the discussion of a different question. In fact, they are encouraged to move if they feel they are no longer learning or contributing where they are. The only rule is that there can never be more than eight or fewer than three people at any table. No one is required to play host and there are no rounds, per se.

In both cases, the groups come back as a whole for a "harvest" of the "bounty." What you as the facilitator are looking for are the emerging themes, key concepts and critical concerns that the organization must pursue.

Graphic Recording. You know that accurately capturing the input from your sessions is critical if you want your clients to be able to take the next steps forward, including ensuring accountability.

A fun and effective but relatively under-used technique in the nonprofit sector for doing this is *graphic recording*. Typically a combination of words and pictures, it appeals to different learning styles, and sticks in people's minds more than words alone. It also helps those whose minds may wander to follow on a visual level.

This technique can be extremely effective for generating big picture thinking because it helps groups see relationships, visualize plans and picture the impact of implementation. You can increase buy-in to a plan by making the tool interactive and encouraging people to add their own pictures, words or symbols to the emerging picture.

Reviewing graphic notes at the end of a particular topic or the day is both quick and interesting. It typically takes about three minutes to review an hour's worth of notes, and it's far more engaging than reviews of written notes tend to be.

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Participants sometimes want to sign the record if they feel it represents their thinking well, and take a picture of it as a record and memento.

Generally, graphic recording is done on large sheets of paper hung either at the front or side of the room by people trained to do this work.

"Big picture thinking is no longer optional."

Graphic recorders can capture approximately an hour's worth of exchange on a sheet that is 8' X 4.' They may start with blank paper or templates that they either produce or purchase for this purpose.

Typically, templates are designed to focus the facilitation of such things as the rules of engagement, visioning, generating options and designing action plans. Two sources for finding trained graphic recorders are the International Forum of Visual Practitioners (www.ifvp.org) and The Center for Graphic Facilitation (www.graphicfacilitation.com). A major source of templates, supplies, and workshops is The Grove (www.grove.com).

Conclusion. In difficult economic times, nonprofits will be expected to provide more and more services with fewer and fewer resources. Boards and their committees must come up with creative solutions to effectively deal with extremely difficult and complex problems. Big picture thinking is no longer optional. Try these techniques to help your clients meet this challenge while continuing to move their organizations forward.

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