Holding infinity

Guiding social process

A workbook for development practitioners

Compiled by Sue Soal

CENTRE FOR DEVELOPMENTAL PRACTICE
CDRA

CDRA is a non-governmental organisation (NGO) based in Cape Town, South Africa, that works as a centre for developmental practice. We work in a variety of ways with people and organisations that are engaged in social transformation with marginalised communities. Through our interventions, we help development practitioners and their organisations create genuine and consistent developmental practices in the field and, through that, the kinds of organisations and leadership that make these practices a sustainable reality. In addition to our consultancy, we offer a range of publications, courses, networking opportunities and events geared towards strengthening developmental practice.

The CDRA Development Practice Series publishes the results of research into significant issues which emerge from our experience and practice. Other titles in the series are:

- *Positive organisation: Living and working with the invisible impact of HIV/Aids – a resource for NGOs* by Katherine Everett and Heather de Wet. Cape Town: CDRA, 2003.
- *Organisations and development: Towards building a practice* by James Taylor.. Cape Town: CDRA, 2003.
- *Consultant formation in Africa: Reflections from practice* by Sue Soal, Rick James, Liz Goold and William Ogara. Cape Town: CDRA, INTRAC and CORAT Africa, 2002.

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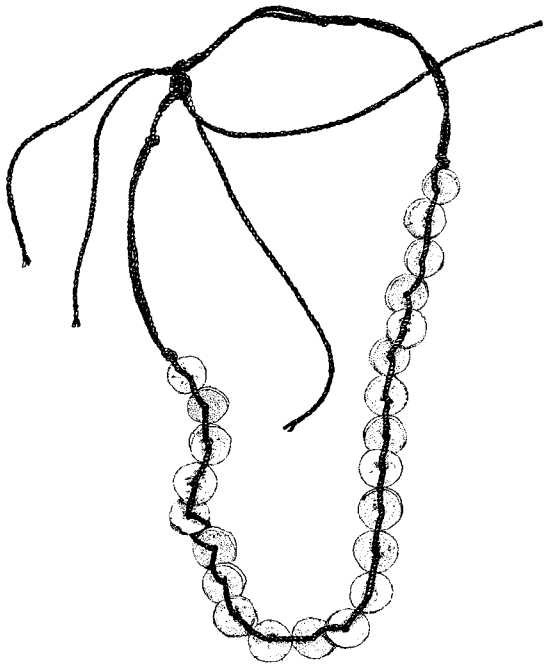

Community Development Resource Association (CDRA)
Compiled by Sue Soal

CENTRE FOR DEVELOPMENTAL PRACTICE
CDRA

Holding infinity: Guiding social process
A workbook for development practitioners
Compiled by Sue Soal

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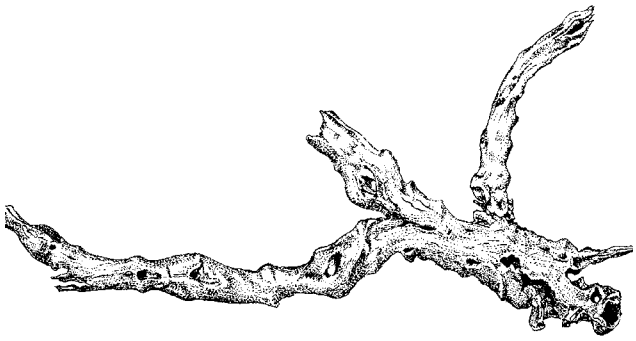
Contents



Acknowledgements v

1. Opening 1

Why this book has been written 1

Who it is for 3

What it is trying to achieve 4

How it approaches things 5

How to use it 5

Using the exercises with others 7

Thoughts on some key words 8

First process: Starting with self 9

Exercise: Finding my current question 11

Box: Characterisation 12

2. Approaching 14

Second process: Thinking about development 15

Exercise: Reflecting on development 16

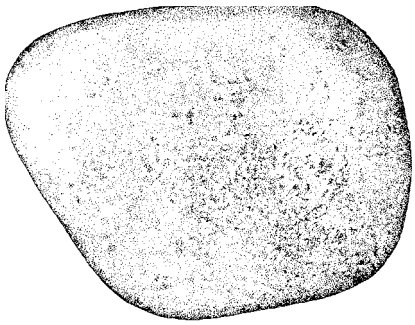
Exercise: Turning points 17

Box: Development is . . . 18

Exercise: Development as social process 19
Box: Social process and the practitioner 20
Exercise: What is development? 23
Third process: Intervening in development 25
Exercise: Building my approach to intervention 26
Box: The developmental intervention 28
Fourth process: Returning to self 31
Exercise: Reflecting on my practice, building a vision 32
3. Intervening 34
Fifth process: Meeting – the developmental relationship 35
Exercise: Qualities in developmental relationships 36
Box: Working with some qualities 37
Exercise: Assessing myself on a relationship spectrum 40
Exercise: Reflecting on a current relationship 42
Sixth process: Seeing – observing the situation 43
Exercises: Listening 44
Box: Levels oflistening: A model and an explanation 46
Exercises: Observation 49
Exercise: Double characterisation 52
Exercise: Writing perspective 53
Seventh process: Facilitating through the change threshold 55
Exercise: Surfacing facilitation 56
Exercise: Thinking about facilitation 56
Box: The art offacilitation 57
Box: Facilitation skills 59
Box: Other thoughts on facilitation 61
Exercises: Deepening self-understanding 65
Exercise: Consolidating my approach to facilitation 70

Eighth process: Accompanying – supporting changed practices 71
Exercise: Working into change 72
Exercise: Changing relationship 73
Box: Supporting changed practices 74
4. Centring 77
Ninth process: Learning from practice; learning about practice 78
Exercise: Learning about learning 79
Box: The action learning cycle 79
Learning practices 81
Practice: Reflecting on relationship 81
Practice: Reflective reports 82
Practice: Presenting a case study 83
Box: Methods of presenting case studies 84
Practice: Establishing my own toolkit 85
Introducing these practices to others 86
Tenth process: Ending with self 87
Exercise: Returning to self 88
5. Closing 89
Using this workbook in facilitated processes 89
Example: Monthly learning meetings 89
Example: A residential workshop: Introduction to guiding social process 90
Example: A two-year process for experienced development practitioners to enhance their abilities to guide social process 92
Endnotes 93
References 98

Acknowledgements



This workbook has been a long time in the making and we are indebted to many people. Most of the exercises used here were employed or devised for the training programmes of the Community Development Resource Association (CDRA). Over the years, we have run Facilitating Organisation Development (FOD), the Fieldworkers' Formation Course (FFC), Facilitating Development (FD) and the Fellowship Programme. CDRA is grateful to Hamo Hammond, Allan Kaplan, David Scott, Mzwai Msoki, Geoffrey Mamputa, James Taylor, Dirk Marais, Lynette Maart, Nomvula Dlamini, Doug Reeler, Lungisa Huna and Sue Soal who, as co-facilitators of some of these courses over the years, contributed towards the development of the approach promoted in this workbook.

David Scott and Mario van Boeschoten, both professionally associated with the Nederlands Pedagogisch Instituut voor het Bedrijfsleven (NPI) [Dutch Educational Institute for Trade and Industry], have played powerfully formative roles in the development of CDRA's approach and practice. What is presented here would not exist without their vital contribution to our ongoing professional development. Further, many of the core exercises, versions of which are shared here, were devised by the NPI, and brought to us through David and Mario's work over the years.

Subsequent work has taken CDRA's approach further, particularly its application to the field of development work. Of special note is the honing of our approach in the Fellowship Programme[1] over a

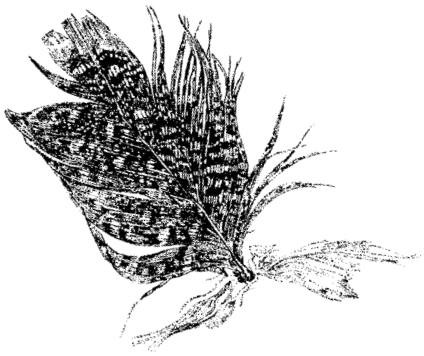
period of five years. This approach has been described and developed further by Allan Kaplan in *Development practitioners and social process: Artists of the invisible* (London: Pluto, 2002). A final, formative influence on the work of CDRA is the action learning methodology,[2] CDRA's use of which is described in *Action learning for development: Use your experience to improve your effectiveness* by Dirk Marais, James Taylor and Allan Kaplan (Cape Town: Juta, 1997).

We are extremely grateful to the Charles Stewart Mott Foundation for their generous support which made production of this workbook possible.

Finally, and as compiler of this workbook, I want to express grateful thanks to Allan Kaplan and Stephen Heyns for accompanying me in such a rigorous and engaged way through the process.

Sue Soal

Opening



To see a world in a grain of sand
And heaven in a wild flower
Hold infinity in the palm of your hand
And eternity in an hour.

William Blake

Why this book has been written

CDRA has worked since 1987 as colleague, consultant, trainer and client with hundreds of development practitioners, all of whom are involved, in some way or another, in intervening into social process. We are often asked to produce a 'toolkit' to make our exercises and methods transparent and accessible to those who have encountered and found them useful.[3] Yet, on reflection, and repeatedly over the years, we have reached the same conclusion: much of what works in CDRA's approach cannot be turned into the form of a manual since it arises out of each unique situation. We rely less on exercises and methods, more on each practitioner's professional insight, judgement and ability to intervene *in the moment*.

This workbook is not primarily a 'toolkit' for application in the field. Rather, it exercises those abilities that we tend to assume as a 'given' in the course of our work; that element of self that we assume is ready and able to take on board and pursue new directions, strategies, approaches and techniques, wherever we may find them.[4] We wrote this workbook for those who ask:

What does this intervention ask of me?

Working with social process is no easy task. This is partly because it asks so much of the practitioner's ability and confidence, yet gives little assurance in return. In this profession, there are few bases of 'knowing'. Usually, we find ourselves a little uncertain, without all the materials at our disposal when plotting our next move, always stepping into yet-to-be-discovered fields.

In our attempts to deepen our abilities to work effectively we face a paradox. To cultivate an effective discipline demands that we name and describe what we are working with. Yet, development work really is about intervening into the very process of life itself, and how do you name that, let alone formalise an approach to working with it? How do you grasp it – conceptually and practically – without spoiling it, or missing the point? How do we intervene in a way that guides and does not destroy that which is already living there? How do we 'hold infinity'?

Abstract, aggregated, mechanised and formulaic solutions are inadequate to meet the pressing demands of the social realm. Development practitioners are not old-fashioned scientists, coolly observing, analysing, diagnosing the situations they encounter, then formulating or prescribing a solution. Rather, we are an integral part of the situations that we do intervene into. We are both participants and observers.

How do we see the world of human potential, deficit, inadequacy and striving out of which our interventions arise, and into which they are made? How we see our world forms the basis for the interventions that we bring and so we are challenged to grasp the full complexity of human existence, organisation and action. To prepare ourselves to do this demands special qualities and abilities. That is what this workbook is all about. It aims to help us be both a part of and separate from; to be these things simultaneously. Holding infinity.

This workbook attempts to tackle this paradox. We do not believe that development and development intervention are purely intuitive, subjective or personal. There is meaning in our work that demands appreciation; rigour that can be honed; approaches that can be learnt. We are conscious that attempts to work *methodically* at development risk being reductive. Yet rigour and discipline are not reductionist and they are not mechanistic. Somehow, we must find a path through easy 'tools' and prescribed formulae without compromising on quality. This is found not through seeking more 'out there', but in turning inward to self. The magic in social process is found not in learning tools and methods, but in *how* we see the processes into which we intervene and how we create and adapt our interventions to meet them. How we guide that which we encounter.

This demands so much of the individual practitioner. It is the reason why effective development intervention begins with, and proceeds through, conscious development of self.

Instead of offering a 'how to' manual, we offer a developmental process through which the reader can journey. Many of the exercises that follow are handy when intervening into other people's processes. However, a key principle that we have learnt over the years is that you *can't do with others what you have not been through yourself.* In other words, the best way to improve, or establish a developmental approach in your practice is to go through some form of develop-ment process yourself. Once you have done this, you will have some capacity to adapt and apply what you have learnt to others and other situations in the field of practice.

This workbook pursues this 'first principle'. Its format reflects our understanding of the development process itself. It challenges the reader who seeks methods and tools 'out there' to look inwards; it suggests that the impulse to address the needs of others first be acted on by facing and beginning to address what is wanting in oneself. In response to the question 'how do you do that?', it offers the response: 'through constantly meeting, and transcending those same obstacles that I find in myself'. We wrote this workbook to support those practitioners who wish to act concretely, practically, from the viewpoint that when you intervene into social process – as facilitator of trans-formation; as development practitioner – 'you are your own best tool'.

Who it is for

This workbook is for anyone who works (or wishes to work) developmentally – that is, in an integrated, systemic and transformatory way – with the questions of others, be they individuals, groups or organisations. You might be a leader, a field worker, a consultant, an organiser, a donor, a researcher or a manager. You might even, or also, be an engineer, a social worker, an ecologist or educationist. We assume that many (but not all) who read this book work in some professional capacity in what is known as 'the development sector'.

The workbook will be particularly useful to those building their practice. We do not pursue self-awareness and development for its own sake in this book. We pursue these questions so that we can intervene more effectively, sensitively and constructively in the lives and processes of others. We pursue them so that our interventions are better equipped to facilitate development of whole systems. Our ability to intervene well is directly related to our ability to be authentic. The exercises contained in this workbook follow from, and work in support of, our efforts to develop our own authenticity.

What it is trying to achieve

In these pages, we focus on those core qualities and competencies needed when intervening into social processes. Such a wide brief is necessarily open and diffuse. There is no blueprint, and many questions have no immediate answers. In the end, therefore, this approach to development practice is both about cultivating the individual's ability to accept and live with uncertainty and to intervene into uncertain situations as appropriately as possible.

We believe that this book meets a real need in current development practice – it aims to be useful to a broad range of prac-titioners, bringing together both practical method and the thinking behind it. While striving to remain concise and accessible, the workbook combines theory and application. Our view is that good development practice consists of several related elements, not simply skills and methods. *First*, it consists of one's conscious sense of purpose in the world. Without this, we are simply implementing technical manoeuvres, not pursuing an inner purpose. *Second*, and closely related to this, is our way of seeing the world – the role of social development and the social development practitioner within that – and a willingness to continuously build understanding.

Third, is a conscious approach to acting in, and on, the world – a body of practice with areas of competence underpinned by particular working principles and values. *Finally*, good development practice has a set of tools, the creative ability to use them appropriately, and increasing ability to develop new ones as they are needed.

This book emphasises the second and third features of development practice – it works with your conceptual grasp of the world and with your approach to acting on that. It assumes that you come to this workbook with a clear sense of your purpose in the world. With respect to the fourth element of development practice, the workbook concentrates on cultivating judgement about methods and their use as well as providing a set of tools that can be adapted for use when working with others.

While this workbook is not a theoretical text, it is not a set of practical guidelines for how to implement processes that have worked in the past either. Development practice is primarily about bringing creativity and humanity to situations that have become stuck or broken. If deve-lopment practice is to stand a chance of having its desired impact, it demands intimacy with people and situations. This, in turn, requires practice that is coherent in its thinking, and robust in its humanity and action.

All development practitioners need to know where they fit in and that they make a unique contribution. They also need to

have the ability and inner authority to adapt and purse that contribution according to the unique circumstances of each situation they encounter. We hope that this workbook contributes towards strengthening those capacities in its users.

How it approaches things

This workbook addresses the three core practices in guiding social process. These are observation, intervention and reflection. Together, these make up an *integrated* development practice, one that combines the activities of 'doing' and observation, both inward and outward.

While the qualities, abilities and skills needed for such a practice can be described (as many are in the pages that follow), developing insight into using them is a dynamic and constantly evolving process. The truly relevant aspect of our practice is built as we go along. This small workbook offers one contribution towards that process by exploring the core practices of observation, intervention and reflection in the three sections that follow.

Each section consists of a number of 'processes'. Within each process, there are short, discrete conceptual pieces and models that offer definition to the process. There are also exercises that try to help the user reach a new place of understanding and seeing. These exercises offer an opportunity for the user to consciously integrate the learning and movement arising out of the work. Finally, the processes offer guidance on how these exercises might be adapted for use with others. The final section of the workbook – *Closing* – explores the possibilities for applying this work in other settings.

How to use it

Have a practice

We say that this is for anyone working developmentally with the questions of others. There is little point in setting out on the journey mapped in the workbook if there is no corresponding practice in the world. The processes described here assume learning from practice, and it is hoped that new resolve is implemented in that same practice. That said, there is no such thing as a perfect or ideal practice. You might be a more-than-full-time fieldworker, project manager or organiser whose practice occupies a 14-hour day. You may be new to the field with only one or two experiences of developmental practice to draw on. You may be a manager who only works developmentally with people some of the time. All are examples of practice.

Secure at least one 'other'

The text is written in such a way that it can be used as a tool for reflection and self-development by an individual, working

largely alone, but with access to a 'speaking partner'. This is a friend or colleague with whom ideas and thoughts can be shared and who can be trusted to listen deeply to your account of yourself. Another possibility is to engage in this process as a mutual exercise – two people acting as speaking partners for each other.

The point is that this workbook is all about the social process – it is about what happens *between* people as much as *inside* individuals. The full impact of these exercises cannot be felt if you do them in social isolation, although a great deal of thinking and reflecting can – and some-times should – be done alone. For this reason, effective use of the workbook does require the involvement – in whatever capacity – of at least one other person. While we address the text largely to the individual reader, and refer to the speaking partner, a work or study group can just as easily pursue the process and exercises. With several exercises, group work provides a wider variety of material, thereby enhancing the quality of the process.

Do the exercises

The real benefit of this workbook lies in actually doing the exercises. The strength of the approach lies in the combination of concept and application *through* reflection. *Doing* the exercises will do more than enhance your understanding of this approach to development practice – it will change the way you see, think about and act in the social realm. There is no substitute for practice.

Decide on your plan and process

The processes follow a form – from 'self' (the first process) to 'concept' (the emphasis of the second, third and fourth processes) to 'practice' (the emphasis of the fifth, sixth, seventh and eighth processes) and back to 'self' (the ninth and tenth processes). Thus they work well if done in sequence, perhaps as a series of weekly sessions, or adapted to create a retreat process. However, they can just as well be used individually. Ultimately, you and your needs and questions will determine how you use this workbook, but it is worth spending some time thinking about just how you will do that.

Decide on time limits, and stick to them

Despite this being a book of exercises, we have deliberately avoided prescribing times for each step. The time required for an exercise must be decided by the user. Thus, a reflective exercise, done alone, may take an hour as the person doing it meanders through his or her thoughts and memories. The same exercise done in a large group might allow only ten minutes for reflective thinking. Both can work, depending on the circumstances. The important thing to bear in mind, however, is that time should be carefully taken account of and thought

through in advance. Once limits have been set, they should also be kept . . . managing one's time and being able to work creatively with what you have is an important skill in development practice. On this issue, it is also worth stating the obvious – that whatever time is set aside for this work should be uninterrupted and in a space conducive to reaching focus and depth.

Follow the steps in the order given here

The exercises are deceptively simple. Yet it is important to follow all steps, and to do so precisely in the order in which they appear. There is a certain discipline in seeing and thinking that is mapped out in these exercises – it is the very essence of the practical application of this approach to social development. Therefore, the very practice that you are seeking to build through working with the book is built by following the steps in the exercises.

Keep simple records

Finally, this approach is 'low-tech', it requires intimacy with your subject – yourself – and so does not require any complex or technical recording devices. It requires a blank writing book, a few pens and pencils and some coloured crayons for drawing and highlighting. The writing book can usefully double as a journal – many of the exercises evoke powerful memories and emotions, and it can be helpful to write these down (even if the exercise has not called for this). Others may result in inspired resolutions, in commitments that are worth recording. Still others yield learning and insight that should be stored for future reference. For all of these reasons, a journal is helpful. You might want to turn this workbook itself into a personalised book in which you have written your ideas and comments.

Using the exercises with others

This workbook is focused primarily on the individual working collegially with another. However, we are mindful that all of the exercises can be used in the course of one's own work with clients. For this reason, each exercise is followed by a few guidelines on how it might be adapted for use with others, particularly in a group setting. And here the related considerations of timing and time emerge repeatedly.

How one chooses exercises, groups them into a process, adapts them to the needs that emerge in the course of that process, and then weaves a thread throughout that process that ensures participants have an experience that is whole and integrated is one of the single most important (and difficult) tasks of a facilitator of social process. Process design and re-design in the moment – the timing in a process – is crucial. We must prepare as well as possible, but we must be willing to let go of even the best preparation if the situation demands it. This sense of timing cannot be taught.

While the exercises presented in this workbook are annotated with a view to running them as well as possible, it is impossible to say where and when they are appropriate to use. Working out which exercises to use in which situation is the task of a practitioner, based on his or her reading of each situation as it is encountered.

With respect to time, all that needs to be said is that there is almost invariably too little time to do justice to what processes require of participants. Working in a way that is 'participatory', 'inclusive' and 'people-centred' *demands* time. There is little point in putting a group together, asking its members to speak freely and from their hearts and then, ten minutes later, telling them that they have 'run out of time' as if it is their fault. When we work with social process, it demands respect, and realistic time framing is one of the best ways of showing it. It is better to do one exercise properly, and to hold it in a clear, purposeful process, than to jam a series of experiences together with no regard for the pace of human experience and learning.

Thoughts on some key words

Client

The word 'client' is used throughout this workbook. Most people associate 'client' with one of its meanings – the one related to words like 'buyer' and 'customer'. However, 'client' is also used to refer to a person or organisation seeking out the services of a specialist. Interestingly, the root of the word 'client' is the Latin *clinare* 'to lean' – a phrase which implies accompaniment of another through a period, a process, which may well be difficult and demand support and assistance. It is in this softer sense that we use the term, because it maintains another founding principle of development practice – that the intervention must be offered in response to an expressed need; that the 'users' of a development practitioner's services must *want* that relationship, must have sought it, and this irrespective of whether they pay for it or not.

The claims that development practice should occur in response to an expressed need and that it is a specialist area of expertise are contentious in the world of development aid. Our view is that, though 'client' might raise a slight sense of 'not being in solidarity with', it equally calls the bluff of those who impose their own world view in the name of a supposed solidarity. It is for this reason that we use it in the workbook and suggest that whenever you come across the word 'client' you can call to mind the questions:

Is this really being asked of me?

and

Am I adequate to respond?

Intervention

There are three senses in which 'intervention' could be used in the course of this

work. The first is in the largest sense – whenever we work as interveners with others, helping them move on in their development process, we are *intervening*. So we might enter into an 'intervention' which spans many months, and involves several kinds of activities. The second sense in which the word can be used is as an event – where we might describe a facilitated workshop, or a meeting as 'an intervention'. The third use the word is the activity of 'intervention' itself. This is where a decision is made to actively bring oneself into a situation – to 'intervene' rather than to observe – and could take the form of, for example, a well-timed remark or an on-the-spot process decision.

Process

As with 'intervention', the word 'process' can be used in at least three senses – the first as a description of a broad series of events and relationships. In this sense process and intervention are similar, although the process of development – the broader rhythms and pattern of life into which development interventions occur – might just as well continue without any intervention at all, and so 'process' encompasses more than 'intervention'. The second sense in which 'process' can be used is when it describes an event (again, similarly to the way in which 'intervention' can be used), for example, a workshop, or training process. The third use of the word 'process' is that of a structured experience, for example, a series of steps that a group might undergo in the course of a workshop. 'Process' in this sense can be used interchangeably with 'exercise'.

Exercise

In this workbook, we use the term 'exercise' to refer to structured experiences, undertaken by individuals or groups in a conscious and systematic way. 'Process' describes the longer-term sequences within which exercises take place.

First process: Starting with self

The point of this workbook is for you, the development practitioner, to work with your inner capacities and qualities – both those that inhibit and enhance your ability to practise effectively – in order to equip yourself better to work with others. It is a truism in development practice that we are our 'own best tools'. It is towards sharpening of that tool that this workbook offers an exploration into self.

In this approach, the part of oneself that is continuously changing and developing is accessed through seeking and clarifying the questions that we live with. By 'question' we mean something quite different from an everyday question of fact or meaning.

Rather, the questions we are referring to here are the conscious expression of those themes and recurring areas of concern that persist through our lives – the dilemmas, secret doubts and areas of clear 'knowing' that we carry in the backs of our minds. In development work – concerned as it is with the very essence of being human – it is likely that we carry these complex themes with us and into the very heart of our practice.

In order to work fully with ourselves, we need to work with the themes, the motifs of who we are. In order to do that, we need to be constantly surfacing and articulating these. Rather than do this in a way that captures who we are into fixed definitions and 'answers', this self-discovery is expressed through the medium of questions, keeping it open and alive and allowing it to change. Expressing these themes and issues as questions is also a way of paying attention, of giving due regard, to the 'big things' that live inside of us and of others. It is a way of acknowledging that there are no simple answers.

To unearth the specific parameters of one's current question and to work with it *as* a question (not as a prompt to a solution) offers focus and momentum to subsequent exploration. Bear in mind that while we may live with recurring themes and concerns, our phrasing of them is constantly changing, deepening, moving on. Explo-ration of one's question results in greater discovery in both the world and oneself. This approach to questions is a practice and a discipline in itself. It is easy to throw a question out into the world, and to demand an answer. Easy too, to give an answer. It is harder to simply work with questions. Working with questions requires us to move in and out of subjective experience. We need to acknowledge the frustration and anxiety that often accompanies the unearthing of questions (in ourselves and others), and continue to allow the questions to live.

This first process pays considerable attention to unearthing your question. We return to it at points throughout the book and at the end, observing the development of this question all along. This first exercise, then, is the gateway to this workbook, and all the learning that may follow from it.

Finding my current question

First, spend some time in a quiet space, with pen and paper, thinking, reflecting and noting your ideas about your work – particularly your practice – and the things that really matter to you in it.[5] Think about this workbook, why you have started it, what it has got you thinking about already, and what you hope to get out of it. These ideas might come as a series of words, or involve a brainstorm. It may require some free association to get you going. However you do it, the point here is to get your mind active around these themes and to unearth thoughts and feelings that may not be immediately apparent, but are a part of your current reality.

Then, look over what you have written down and distil your ideas into a single question. This might be a synthesis of all that you have written down, or one theme might emerge as the obvious area of concern. You may have a burning question that has been with you all along. There is no particular way to do this. However, the question that you do arrive at should be about your work and your life and should contain the word 'I' – in other words, it must relate directly to you.

Once you have an initial question, call to mind one *specific* experience in the past that helped give rise to the question. Picture this experience as vividly as possible, remember what actually happened, what the precise sequence of events was, where it took place and who was involved. Make a note of these thoughts.

With your speaking partner, present your question and some of the thinking behind it. Follow this process:

1. One person presents. Begin by sharing your question and, importantly, how you feel in relation to it. Then, as clearly as possible, tell the story behind your question and complete your presentation by restating the question. The other person (the speaking partner) listens carefully.
2. The speaking partner then shares his or her characterisation of the presenter's situation and question (see the explanation of characterisation on the next page).
3. The presenter sums up what has been heard and describes what he or she takes out of the experience, ending with a statement (or reformulation) of the question that he or she takes into engagement with this workbook.

Characterisation

Characterisation[6] is about meeting, identifying and describing the essential character, or nature, of situations. It is one of the core practices of the approach presented in this workbook. Like listening, it is a very particular skill that can be learnt and practised and, over time, improved upon. Characterisation is important in development practice as it helps the practitioner to make sense, holistically and humanely, of the situations that he or she is working with.

When we characterise, we are trying to see through complexity to what is really present in a situation. We evoke the qualities that lie behind what is immediately apparent. Characterisation is not summary, which reduces the true features of a situation to their bare essentials; caricature, which exaggerates the true features of a person, or situation; or criticism, which draws comparison and makes judgements. It simply observes and describes without judging. When we characterise, we are 'making sense of' and coming to a full understanding without reducing, altering or criticising. Characterisation helps us see things as they are.

When we share our characterisations with others, we are helping them to become more transparent, and comprehensible, to themselves, through seeing how others see them. In characterising another, we offer the storyteller a gift of insight for them to draw on and add to their own self-understanding.

When characterising, speech is kept simple and direct. It should be short (no longer than a few minutes), and offer no advice or feedback. When we characterise, we offer something of ourselves and our full experience of what we have heard, we are not coolly appraising another.

We should look at the person whose presentation is being characterised. The characterisation is offered directly to the speaker. Therefore, the words 'I' and 'you' should be used, not 'he/she' and 'we'. When reflecting our characterisation we might begin by sharing what stood out from the story, what 'struck' us. This is done in order to clear our subjective responses to the story so that we can be more fully present to the whole story, irrespective of what stood out for us as particularly interesting or stimulating. Thereafter, we might use metaphor and imagery to evoke the essential qualities and 'character' of the story or account.

The characterisation process is always concluded with the original speaker having the space to say what he or she takes, or does not take, out of the characterisation.

Using this exercise with others

A great deal of development work involves helping people to live with uncertainty. This exercise can help individuals face the everyday-unknown through exploring their questions, and also to bring more of themselves, their own concerns and recurring issues to the situations that they face. Run with a group, it can help to promote the understanding of individuals and of the group as a whole.

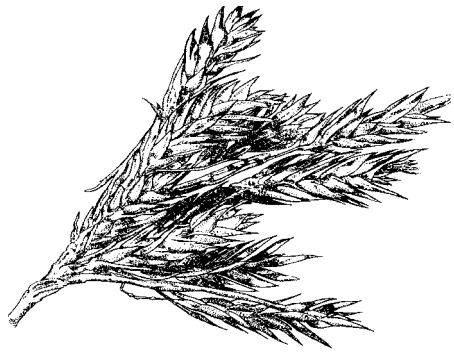
Run as a large group exercise, participants might share the detail of their thinking, and undertake a characterisation process, in small groups of two or three. Final questions can then be shared with the larger group. Run like this, the personal stories and element of personal exposure are limited to small groups and the plenary is used as a space to share information about everyone's questions.

If time and trust allow, and if circumstances demand, this exercise can be run in its totality in a larger group (up to ten participants). Here, characterisation takes the form of a round in which each member of the group has an opportunity to give feedback to the speaker. Run in this way, the exercise can contribute enormously to team, or group, development as facing one's own questions and seeing others do the same can enlarge understanding, tolerance and compassion. If the exercise is run in this way, it is particularly important to ensure that there is enough time for each person to go through the process and to clarify the boundaries of confidentiality as well as ground rules for the way in which characterisation is undertaken.

This exercise can be taken even further to identify the large questions that whole groups, organisations and even communities live with. If this exercise is run with a group (either in smaller twos and threes, or as a whole) it is possible, once all questions have been shared, to then examine these individual questions and help the group to characterise the question that it is living with collectively. This can be a very powerful way of helping strengthen the identity of a group of people and clarify its common purpose.

No matter how it is run, it always helpful to reflect on the exercise itself once all of the 'content' has been dealt with and to offer people an opportunity to share the observations and experience of the process itself. A word on time management: in this exercise it is important to ensure that all participants have the same amount of time allocated to working with their questions. If some participants take more time than others, this can cause hurt and resentment in the group as a whole, undermining the objectives of the exercise.

Approaching



In development work, it is usually assumed that 'practice' is the domain of the person in the field, and that concepts are for the academic and policy maker. Yet the boundaries of practice, the dimensions that shape any particular approach, are derived from the ideas and values that underpin our interventions and continuous development of these.

Of course, knowing *that* is not the same as knowing *how* – and most of this workbook is dedicated to working on the 'how' of development practice. Our experience, however, is that the more thoughtful one's practical work, the greater the chances of it achieving its goals. This is true for fieldworkers, consultants, managers and donors alike.[7] Without knowledge and clear ideas, we do not have practice – we simply have action. In the field of development practice, it is unlikely that action without thought can be of any good at all.

We all have what is often called a 'theory of change' – some notion of how things change which informs the actions we undertake. However, this is not always that conscious, or clearly expressed, even to ourselves. One way to improve development practice is to pay attention to the ideas expressed through action. In adult education, the process of unearthing this thinking is known as 'surfacing the theory-in-use'.[8]

Formulating one's theory is one of the most important things that a development practitioner can do. This involves a continuous dialogue between thinking and doing – applying ideas, testing them against experience, reformulating the ideas and applying them again. We need to be continuously coming to understand both the world

in which we live and work, as well as to deepen appreciation of what we bring to it. Good development practitioners have a clear notion of what it is they are doing, what they bring; a thorough understanding of what it is they are intervening into; and a firm grasp of the end to which they are contributing. This section offers you opportunities to deepen and sharpen your thinking about what you *do*. In Section 4 – *Centring* – we return to thinking about development as a reflective and continuous activity.

Second process: Thinking about development

Ask a group of people what they understand by the word 'development' and it is likely that you will get as many answers as there are people in the group. Not just subtle differences in understanding, but fundamental ones. 'Housing development', 'economic development', 'child development', 'urban development', 'organisation development', 'development aid', 'development studies' . . . each of these terms suggests a distinctive world view, and these are not necessarily compatible with one another.

In the approach to development underpinning this workbook, we are concerned with the field of human development and the social processes of which it is an integral part. In this approach, development is seen as social – not isolated or atomised – with all the parts connecting to a greater whole. The work happens on the relationships and interconnections between people and systems, as well as within them. We characterise our approach to development as being 'from the inside out'. While external and contextual concerns impact powerfully on the development of individuals, groups and larger systems, the vantage point presented here is to look at and integrate that very impact from within – from an agent-centred point of view – and to help those we work with to do the same.

The method used is to tap into the inner processes at work – whether these are an individual, a group, an organisation or a community. We ask:

What is moving in this situation; what future direction is emerging; what is going on right now?

What do we need to understand of the past that may inform this present and future?

What is stuck here, where are the blockages, where are the patterns and recurring difficulties that are inhibiting movement?

This view of development draws considerably on an organic understanding. It is concerned with the innate processes, rhythms and directions that any living system contains within it. Working with this approach, we tap into what exists and work at helping enhance what is there, helping

people and the groups and communities that they are a part of to take the next step on their own path of development. All the while we are mindful that they are also a part of an inter-connected broader system which is affecting and being affected by whatever changes emerge. This understanding provides for a very different kind of intervention from that provided by the view of development that sees it as improvement of an isolated player towards an externally-defined goal.

Reflecting on development

This short exercise serves to bring the issues and concepts to mind as preparation for the rest of the process.

Together with your speaking partner, take a few minutes and brainstorm as many associations as you can find connected to the word 'development'. Allow the associations to be completely free, to run away with themselves, to generate new ideas and connections. Do not constrain or judge what you come to. Write these all down on a piece of paper in no particular order.

When you have run out of ideas, look together at what you have come to and identify those associations that come closest to describing how each of you see 'development'.

Then each think of a brief story, or account – drawn from personal experience, or observed in another, or even heard or read – that best illustrates this understanding of development. Share your stories with each other.

Using this exercise with others

It is always useful, at the start of a process, to open the topic gently and gradually. Jumping straight into an in-depth exploration can leave people feeling confused (as to why they are doing it) and burdened (to reveal things that they are not yet ready to reveal). A light brainstorm of associations creates space for people to share without having to risk too much. It also helps the whole group to focus, together, on a common task.

Run in a group, this exercise can be kept to a five-minute brainstorm of associations, without any story telling. As facilitator, it is important to maintain a clear boundary around the brainstorm and to prevent any dissection of, or debate around, ideas at this point in the process.

Alternatively, the story telling can follow the group brainstorm, where participants in twos or threes share their stories with one another. (It is important to remember

that if you ask people to tell stories, it will take time. A round of story telling involving three people is unlikely to take less than half an hour, and can easily take a lot longer.) The story telling is a useful way of helping people get comfortable with each other and also deepens connection with the theme.

After the story telling, it is useful to return to the larger group and, without opening a 'round' of report-backs, ask if anyone has anything they would like to share at that point. Doing this helps reconnect everyone to the whole group, deepens exploration of the theme and encourages self ex-pression (as distinct from collective expression) in the big group.

Turning points

This exercise[9] starts with the most immediate and direct experience of development – your own. It offers an opportunity for you to explore your experience of development, to reflect on it, and then to formulate your under-standing of the broader processes of human development. It asks that you spend some time thinking over your life, particularly significant 'turning points', and uses these as a basis for learning about development more broadly.

To begin, spend some time identifying the three most recent significant 'turning points' in your life. These should be events or periods in which you think your life underwent some significant change. A turning point could be summed up in a distinct moment – for example, the instance you heard some news; or it could involve a longer time – perhaps the length of a training course, an illness, a pregnancy. Once you have found the three turning points – and for each one, picture the whole time well – it might help to ask:

What happened before the turning point, and during it?

How did I handle the situation, what was my life like after each turning point?

Note some of the key ideas that come out of reflection on each turning point. Then, share these thoughts with your speaking partner. Your partner's role is to hold and also to gently push further, to find the questions that can deepen reflection. When you have finished talking through the turning points together, look across the three events:

Can you see any patterns?

What does this tell you about how you learn, how you deal with change, how you develop and grow?

Draw some conclusions from this. Then swap roles and follow the same process for the speaking partner. Once complete,

compare both people's patterns. Out of this comparison:

Can you see any similarities in your patterns?

Do you find general patterns about development, tentative claims that you can formulate about development?

What are they?

Make a note of these before continuing.

Development is…

This exercise has been run hundreds of times in various courses and processes. Each time the exercise is run, however, it yields new and unique discoveries for each participant. The following points have emerged out of previous uses of this exercise. It might be interesting to compare these to your own conclusions:

Development is . . .

- a living process that happens, irrespective of external interventions
- not linear, but marked, in steps, by transitions between phases
- often spurred on by crisis or pain
- not 'instead of', but 'as well as' – development absorbs, incorporates what it is moving on from, it tends not to discard
- about letting go of the old in order to take on the new
- transformation, not just growth
- about the journey, not the destination – each arrival brings with it a new challenge and a new departure
- about the places of transition between phases, and these tend to be places of chaos
- about seeking stability and predictability through the instability of transition even while it is in the places of transition, where we have greatest freedom and openness.

Using this exercise with others

'Turning points' helps connect the personal and inter-personal with one's working life and actions in the world. More than any argument, this exercise can illustrate the connection between one's 'inner' world of emotion, subjective experience and memory and 'outer' world of fact, objectivity and intention; between 'personal' and 'professional'.

Connecting personally with the process of human development helps one get in touch, consciously, with its unpredic-tability, chaos and strong emotional content. With this connected under-standing in place, we are better equipped to practise developmentally and to make more realistic undertakings and promises in the course of our work.

This is an extremely powerful exercise that can be well used to help people connect their actual experience of development with a more abstract understanding of it. It is therefore useful in any setting where increased understanding of development is required. This might be a training programme for development practitioners, or a change process for people involved in any aspect of the development project – whether they are members of a recipient community or donors.

At a practical level, the impact of this exercise is enhanced when done with a larger group, rather than just in a pair. In this larger process, while the personal sharing happens only in pairs, the general patterns observed about development can be brought back to the plenary group. Comparison across several patterns can yield great insight.

Development as social process

This exercise moves from the 'turning points' exercise – essentially a reflection on experience – into engaging with ideas about social development, in order to help you clarify your own ideas and thinking.[10]

To start, read the following extract from Allan Kaplan's book *Development practitioners and social process: Artists of the invisible*. Then, as soon as you finish and *without evaluating* the ideas, jot down what stands out for you from the article. This is not a comprehension or precis test, and you are not being asked to summarise. Rather, what is being asked is that you note, for yourself, the ideas that in any way stand out for you – and this is whether you agree with them or not.

Social process and the practitioner

'Underlying reality there is a world of archetypes'

(*Richard Wilhelm, Commentary on the I Ching*)

A new way of working with the social is premised on an appreciation for social process, and an ability to work with this underlying and invisible movement.[11] Every living being is in process, which is simply the flow, the stream, of its life journey. Such processes are both archetypal – sharing commonality of pattern with all beings, such as gestation, birth, death and resurrection – as well as unique to the particular being. Individuals and social organisms (groups, organisations and communities), endowed with the gift of (self) consciousness, have the possibility of becoming aware of their own processes, and thus become responsible for their own evolution, rather than merely being subjected to that evolution.

Process is dynamic; a river of rhythm and form. It is a pulsing movement, both progression and oscillation, a spiral flow. The process is the whole within which the individual movements occur. It both underlies and emerges out of the parts, and is invisible. More than simply what is directly seen, it is what is sensed, experienced, understood, untuited from what is seen. To apprehend process, we have to move into a different state of being – one which is simultaneously inside and outside, participant and observer, analyst and artist. Such a state of being lies beyond the realm of logic, beyond the reach of analysis, beyond the constraints of intellect. Such capacity entails the development of new faculties and thinking.

Social organisms, being self-conscious and therefore responsible for their own process, can hit impediments with respect to these processes. The flow and movement can become blocked and entangled. It can become arrythmical, confusing. Or it can become so harmonious as to induce sleep, thus reducing consciousness and mindfulness. It may become so alluring that we attempt to capture it once and for all, in structures and procedures and rules and regulations, which also may induce sleep and reduce mindfulness. It can be defended literally unto death. It can curtail freedom and creativity, rather than promote it. It can lose touch with its changing context – with the wider processes within which it is embedded.

When the social organism experiences a problem, it can be a call for assistance. Such assistance can come in many guises, more or less useful. As social practitioners – whether consultant, leader or constructive participant – we are there to work with the organism's process. As such, we have to learn to read and recognise the underlying patterns, and help unblock or adjust, so that the ongoing process of development may unfold once more. To help unfold what has become enfolded within; to enable

to emerge that which has become submerged. To allow the organism's path to reveal itself once more, so that it does not turn outwards in its pain, projecting its own weakness onto others; but regains responsibility for itself, achieving openness and tolerance through becoming mindful of its own process (and thereby also the processes of others).

During any such intervention, which will itself unfold over a period of time, there are many interweaving processes to be aware of, but three are primary: the organism's process, the practitioner's own process of unfolding, and the interaction between these – the intervention – which is in itself a process. The practitioner is responsible for maintaining awareness and centredness in all.

We know that there is an ongoing oscillation between order and chaos, fundamental to the very nature of process. That to take on the new we first have to let go of the old. To lose what we have found. To discover, to become aware of the pattern we must often allow the process to dissolve into chaos, so that new order, a new and more appropriate pattern, may emerge. This is true, as well, for these three processes: the client process, the practitioner's process, and the process of the intervention itself. In order to engender development, all these processes will at times lose their coherence, form and rhythm, so as to enable the new to emerge. These periods of chaos are the points of transition itself; without them, the process will not evolve into a new and more healthy pattern.

Inside these points of transition, the coherence of the pattern is lost for a while, so that a new pattern may be found to continue the process. Yet, in the losing, in the chaos, there must still be an outer holding, a wider security within which vulnerability may be engaged with, faced, and moved beyond. It is the practitioner's responsibility to do this holding.

There will be times when the practitioner's own process, and the process of the intervention itself, may become chaotic. When this happens, or when all three processes arrive at this juncture simultaneously, the practitioner is still responsible for holding the outer whole. The practitioner has to be both inside and outside at the same time: inside and outside the organism's process, inside and outside the intervention, inside and outside their own process. There are many different rhythms and forms happening simultaneously, and many different arrythmical and formless cacophonies sounding, not least the practitioner's own. Centredness is demanded in the midst of such social flux, that the world may still be held, and the thread found once more.

How do we learn such centredness, from which the world may be seen, and intervened into, despite movement, contradiction and confusion? First we have to learn to see

process itself – which is to see the invisible, to appreciate the underlying whole. To see the system as one being, rather than focus on component parts. Then, we have to learn to understand the archetypal patterns which underlie human and social process, and become able to read the uniqueness of individual paths as they manifest within such archetypal patterns. All invisible. Then we have to integrate the discipline of intervention into such social processes, so that it becomes a familiar, rigorous yet flexible practice.

Centredness, self-awareness, means being at home with the notion of emptiness. Not to fill ourselves with opinions and information and expert solutions, but to empty ourselves so that we may allow the social organism's own process to evolve with integrity and rightfulness. The new emerges, it is not created. We can only hope to create suitable conditions from which it may emerge. We can hope to allow and enable, with respect and deference; we cannot impose. The way to deal simultaneously with myriad social processes is to empty oneself. Only then can we attend to the various flows without becoming overwhelmed; this is centredness.

Remember, as you finish reading, to put the workbook aside and jot down those ideas that made an impression on you – positive or negative.

Then, once you have written down what stands out for you, and using these notes, consider the following:

What does the article confirm in my own thinking about development?

What does the article challenge?

What do I disagree with fundamentally?

Write these thoughts down. Then:

1. Think back to the insights you gained from the 'turning points' exercise on page 17. Are there any matches or misfits in the ideas?
2. In dialogue with your speaking partner, share some of these thoughts. The role of the speaking partner is to listen carefully for the things that obviously matter, the things that fire you up with enthusiasm; also for inconsistencies and contradiction; for misunderstanding or confusion; for 'blind spots'. The speaking partner reflects back to you what he or she has heard.

At the end, make a note of the major questions about development that you are left with.

As with all speaking partner exchanges, you might swap roles and even compare thoughts once you have both had a turn.

Using this exercise with others

Using readings in processes – be they training processes or work-sessions – can be a helpful way of changing pace and enabling participants to find, and be with, their own thinking. However, in a non-academic environment, where your task is primarily concerned with process, or learning about process, readings are rarely useful to the whole group unless parti-cipants have been given sufficient time to read them. In a residential setting, participants could be asked to read an article overnight in order to be able to work with what it says the next day. Alternatively, it is important to make time for reading and processing of readings in the actual 'work' time of the process.

What is development?

The approach to development suggested by the two previous exercises views it as multi-dimensional, even contradictory, for example, that it is marked by distinct, progressive phases, but also that it is unpredictable. The development prac-titioner will know that this contradiction is entirely possible. It *is* possible to have a strong sense of where a situation might be going, yet still not know exactly what will happen next, or when. Very often, it is only in retrospect that we can make sense of a situation. In the heat of the moment, things appear erratic. Sometimes this 'sense' of development is intuitive – when subjected to logical scrutiny, things do not always add up. Often, observation of the fundamental paradoxes in development is expressed as scepticism.

The following thoughts and responses to this approach emerged out of a similar exercise in the past:[12]

- If development is unpredictable and happens at its own pace, what role is there for planning?
- What is the point of getting involved in it?
- Development cannot be controlled, yet so much of development practice is about control – financial and other – how can this be reconciled?
- What is the difference between being responsive and reactive?
- In what ways does this approach address power relationships?
- Working in this way demands high levels of skill – how do we develop these skills?
- The environment, or field of change, is not central in this approach, yet development practice and development organisations exist precisely because of that environment. How can these elements be reconciled?

- Where is the place for the activist element in this practice?

Look over these questions and the questions that you identified in the previous exercise (on page 22). Choose one or two that you would like to work with a little further. For each question you have selected, spend some time thinking through **your** own responses to it (as if you were in an imaginary conversation with yourself) and make a note of these ideas.

Finally, and drawing on all of the work in this process, *Thinking about development*, write down your response to the question 'what is development?' Through this, and in your own words, you will be expressing your own 'theory of change', thereby laying the basis for later work on your intervention practice.

Using this exercise with others

The basic purpose being pursued here is to help people – *as individuals* – to connect more directly and expressively with their own thinking. It is not, in the first instance, about producing a new idea for the participant, although it might involve some new thoughts, and it is not about generating group learning, although that might follow quite naturally.

A developmental approach always begins with what exists, what is already living in a person, group or organisation. In a training environment it is relatively easy to superimpose 'new' and 'better' ways of seeing onto existing ideas, particularly when those ideas are half-formed and under-expressed. While such attempts seldom work in the long run, they are methodologically less challenging and make for group processes that are less challenging. Participants become so involved in keeping up with the trainer's thinking that they cease to pay attention to their own.

The more interesting task is to help people to express themselves, while engaging with and even challenging that same thinking and expression. Asking people to write things (or even speak or draw them in their own words and images *from inside* of themselves) is a very powerful way of making people's thinking visible, and conscious.

It must be said that, particularly in a group environment, this exercise can be daunting. (For very many people even asking a question in a workshop can be very frightening.) When we ask people to share what they *really* think, we are asking them to reveal a great deal of themselves, and this irrespective of how 'educated' they are. Any decision to use this exercise, and many others in this workbook, should be approached with great caution. The way in which people are asked to share their thoughts, the medium of that sharing (through writing as suggested above, or through speaking or drawing or any other method) and timing must all be carefully considered. It should not be used at the start of a process.

Third process: Intervening in development

Development cannot be created or forced, and while we may affect it, it also happens irrespective of our interventions. Whatever the influences, development happens in ways that are unpredictable, bewildering and, often, painstakingly slow.

Development definitely does not involve journeying to a fixed point in a straight line, overcoming obstacles along the way. We cannot wish the complexity of development away and, when we practise in development, it is precisely this complexity that we must work with.

In light of this, we can well ask what we, the practitioners, can possibly bring that will be of value when intervening into development. When we intervene *developmentally*, the intention is to help bring about the best possible outcome for that particular system (be it an individual, group or organisation) at that point in its development. And, intervening developmentally, we become a part of that system, thus we too are changing, being affected, even as we contribute to changes within that system.

Development practice is the antithesis of an instrumentalist approach that intervenes in service of an externally defined agenda. An instrumentalist approach defines problems and solutions outside the system. Worthy causes are often pursued in this way. Indeed, they often demand an instrumentalist approach. The anti-apartheid struggle was waged against a firmly externalised enemy. Welfare is often approached instrumentally – the problems being addressed are seen in isolation from their causes and consequences.

In a developmental approach, both the person intervening and the system into which the intervention is made carry responsibility for both the problem and the solution. Means and ends, causes and consequences, all are held in unity. The hallmark of a developmental approach is responsibility for self and circumstances. We may not be the cause of the situation we find ourselves in, but we are fully in charge of the way in which we deal with it.[13]

We draw a distinction between 'development practice' and 'developmental practice'. A development practice concerns itself with the outer, with altering and shaping form, structure and external conditions. A developmental practice concerns itself with the inner worlds, not only of the client, but the practitioner, too. Working developmentally, we are concerned with the internal conditions in a situation, inner capacities, abilities and levels of motivation as well as the external situations that frame these. Our work is developmental to the extent that it tackles these inner conditions. Put another way, it is developmental to the extent that that all elements of the system are learning continuously.[14]

Such a focus and aspiration demands particular abilities and qualities from the practitioner. This overriding commitment to work from within generates boundaries and guidelines for the pace and quality of the intervention. A ready-made intervention that prescribes a certain action irrespective of the unique characteristics of a situation is not very helpful. However, it is also not helpful to approach a situation with only emptiness, with the view that 'anything goes'. We are unlikely to be of much use if we arrive with nothing.

This process – *Intervening in development* – builds on the last. It asks:

If this is my understanding of development and the development process, what kind of practice does that give rise to?

This helps to explore the shape that intervention processes tend to take. The purpose is to conceptualise your intervention process. It is for you to clarify your own guidelines for decision making about action, design and intervention throughout the intervention process.[15]

Building my approach to intervention

This exercise offers you a space to look at your approach to intervention as it currently is, and then to look at it again, casting an analytical eye over it.[16] This enables you to begin to describe it from the outside, as if from a bird's eye point of view, rather than seeing it only from the inside, from the driver's point of view. It then goes one step further and introduces other ideas, before closing with a space for you to consolidate all the thinking. Ideally, this exercise should be done alongside your speaking partner who would be doing the same thing. It involves several steps, so ensure enough time is given to doing it (easily a whole day), or spread it out over several sessions.

First, think over your work, and identify one development intervention you have carried out in the last while. This should not be a short or 'small' intervention (for example, making a contribution in a meeting or giving feedback to a colleague), but rather a 'big' intervention, a fuller process lasting over a period of time with several people (for example, a relationship with a group

or organisation where you are trying to find something out, or a specific project undertaken with a group with which you have a longer, more open-ended relationship). This intervention could be with 'outsiders', people you are working with outside of your immediate work environment, or 'insiders' – perhaps colleagues or employees in your organisation.

Think over the whole intervention. Ask yourself:

What happened, from beginning to end?

Make a rough note of the key events, in sequence, through the course of the intervention.

Then, and only once you have described the events as fully as possible, try to group the events so that the steps, or phases, that were *effectively* followed in the process emerge. It may be that you were following a very clearly identified step-by-step process, and it may be that this process was implemented according to plan. However, the very nature of development work makes this unlikely. So it is worth looking carefully at what actually happened in order to identify the phases accurately. Then, give these phases or steps names (for example, 'negotiation' or 'organisation building', even 'conflict', or 'misunderstanding'). At this stage, these steps should reflect what really did happen in the intervention – not what you thought *should* have happened.

Second, share this account with your speaking partner who should emerge from the exchange with a clear idea of precisely what happened (you may find that you need to add or change details as you talk it through in order to reflect the situation more accurately), as well as a picture of the framework that was effectively followed. It is important at this point not to judge, explain, or 'improve' on the situation. Here, you are just describing it. Swap roles and hear your speaking partner's account of his or her intervention.

Third, and working alone again, now identify what, in your mind, were problems in the intervention, and think how you would 'fix' them. In other words, rework the phases (and their names) so that they include what *should* have happened, where, in retrospect, the process was not as effective as it could have been and what should have happened to make it a better process. *Here, you are effectively building your own model for intervention.*

Fourth, and once you have this, return to your speaking partner and share your thinking and improved intervention process with him or her. Swap roles again.

Fifth, and finally for this part of the exercise, out of both stories (or all the stories if you are working with a bigger group), formulate one model that you both feel describes the general process that a development intervention follows.

The following model reflects where we came to in the CDRA, after following a similar exercise. Once you have formulated your own approach, read through ours, then follow the few tasks after that.

The developmental intervention

The core process that CDRA has evolved and described over the years reflects what we understand as the archetypal path of the developmental process, a thread that follows through the vastly diverse interventions that constitute developmental practice.[17] While many have devised their own ways of describing this same process, ours continues to resonate and have application for us. Here follows a brief summary of our take on this process.

1. The developmental process begins with the element of warmth, of **relationship**, of human feeling and of enthusiasm. This element creates the conditions for all else that flows from the practitioner-client relationship. Conversely, where it is not properly established, this prevents subsequent growth in those areas.

2. Next, and out of a context of an established and trusting relationship, even while continuing to build on it, comes the creation of a **shared understanding** of and insight into the client's unique character as a social player as well as a perspective on the particular situation of the client. For some, this involves formal research and report writing; for others, participatory processes of picture-building and appraisal, for others, simply being with people and trying to make sense of a situation over an extended period.

3. Only with these two elements in place, that of evolving trust and understanding – themselves having transformatory qualities – is it possible to begin to venture **active intervention** with the intention of helping change along. Often this process of change begins with a facing of self, using the 'mirror' provided by the practitioner's observations, feedback and presence. At other times, it is less structured and intentional – perhaps the facing of a crisis that the practitioner may assist in seeing and facing in ways that help move on, rather than staying stuck. Whatever coming-to-terms this process of change requires and involves, it is precisely through that very process – a kind of 'passing through the eye of a needle' – that the will to move, to take things a step further, to shift a current reality, is found.

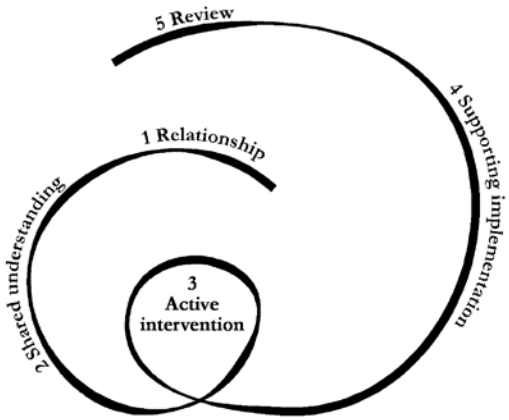
4. Thereafter, and towards supporting the ongoing emergence and taking hold of the new, comes the element of **supporting implementation**, of grounding, of seeking visible results and changes. The role of the practitioner here is to help intended change become a lived reality.

5. While the four elements above operate as a conceptual and practical touchstone throughout our practice, they are held together through the essential element of **review**. Our practice is constantly developing, as are the abilities of our practitioners. To this end, we meet regularly with a view to reflect on practice and build it further. It is here that new ideas, approaches and concepts are developed.

In these regular meetings lie the single most important source of vitality and effectiveness in our practice, and as such they constitute the fifth element of our core process.

We have attached to the four elements of the developmental process and accompanying intervention process the qualities associated with the four archetypal elements. So the first element of relationship and trust is associated with the qualities of fire – warmth and ability to transform. The second element of insight and understanding is associated with air – transparency and insight and a lightness of touch that rises above, that sees the whole. The third element of change and transformation is associated with water – its flow, process and capacity to move, to release stuckness. Finally, the fourth element of grounding is associated with the qualities of earth – in supporting change we seek a materiality, structure and visibility to enable it to persist into the future.

We represent this process, its qualities, and the cyclical nature, maintained as it is, not only through structure, but also learning in the following spiral form:



This model is offered here with some important qualifications. It represents an attempt to formalise a process – intervention into the development of social processes – that, by virtue of its very individualised and unpredictable nature, cannot be formalised. Therefore it is of limited value in the world of actual practice.

Worse than making no difference at all, interventions that rely exclusively on models can do more harm than good. When practitioners abandon their self-awareness, judgement and ability to make sense of situations – their own discipline – they simultaneously abandon a developmental approach. Interventions based purely on models pull the clients away from their concerns and into collusion with the practitioner towards proving the correctness of an abstract model. Naturally, these set-ups diminish confidence and capacity, achieving the very opposite of what the

practitioner has set out to do. At best, the client in such a situation just becomes frustrated and disillusioned.

While this model offers a guide, a map-book, it is no substitute for the reality of the relationship between practitioner and client; nor does it substitute for a thorough understanding of the specific needs and concerns of the client. Establishing relationship and understanding requires far more ability than a simple understanding of a model that maps how things **might** be. In fact, when models are followed without a deeper relationship and understanding of what is happening, it is not uncommon for the formal relationship to move along through all the phases, without any change, or only damage, taking place in the client system.

Further, while this model describes four distinct elements of the process of intervention, it also describes a whole process over time. It is based on the insight that development happens over time and is connected to increasing consciousness. Therefore, there is no given 'correct' time when one can move from one element to another. The movement in the process, from emphasising one element to another, and even backwards and forwards between the elements, is determined entirely by the situation in which the practitioner and client find themselves, in whatever context they may be. Establishing clear understanding regarding what is being done and what the expectations of that are is crucial throughout the process. This understanding and the associated expectations require continuous re-establishment. The practitioner may well have a clear idea of where he or she is going, but this is only meaningful if it makes sense to all parties.

Finally, while development interventions may focus on one aspect of a situation, or system, they aim to impact on the system as a whole and thus should take account of the whole system – even while working intensively on one aspect. Awareness of the connections within a system and the various impacts that intervention in one part of the system might have on all the other parts is crucial.

Having read through this brief description of CDRA's approach, return to the work you did on building your approach to intervention and compare your intervention approach to the one presented above:

Do you have any new insights about development practice?

Do you want to make any changes or additions to the approach that you formulated?

Do you see any principles for practice – good working rules – that you can note and incorporate into your work?

Share all these thoughts with your speaking partner and swap roles.

Using this exercise with others

This entire process has consisted of one long exercise. It is conceptually very taxing. In using this exercise with others, the following (some of which are general guidelines for working with the approach in this handbook) should be kept in mind:

1. Follow the steps in careful sequence. They are deceptively simple – in the first part of the exercise it is tremendously important that the *actual* intervention sequence that was followed be surfaced before it is categorised. It is equally important that these two steps are followed before the intervention is 'fixed'. Without that, you are not working with real experience and the exercise becomes academic. Keep in mind, though, that it can be hard to face the reality of our actions. It is all too human to correct as we go along in our account of ourselves (even when that account is only to ourselves). We tend to say 'I should have done ...' and avoid the tougher 'I did ...' Take care to ensure this does not happen at the start of the exercise.
2. It is risky to introduce a new idea after a reflective exercise as it might appear that you are trying to insinuate the 'real' answer into people's learning. On the other hand, adding another perspective adds to the mix of ideas and may help participants see things differently, even if they do not accept all of your ideas. In this instance, the primary objective is to help participants conceptualise their approach to development intervention, and it can be very helpful to share an example of how it has been done.
3. All three parts of the exercise – the reflection and formulation at the start; the introduction of another per-spective; and consolidation at the end – combine to focus on the *participant's* thinking, rather than that of the facilitator. The last part of the exercise where participants are asked to return to their formulations is particularly important as this is where the thinking that people have done is firmly consolidated.

Fourth process: Returning to self

This section – '*Approaching*' – has presented an overview of two elements that contribute towards a practitioner's approach to development work. These are a conceptual understanding and a practical working methodology. We end this section with a third element – and return to self. This is a space for you to reflect on what you have covered thus far and to return to your question and integrate your learning into your current thinking about development and development practice. This

is possibly the most crucial element of a developmental practice – the particular character and special ways of integrating all the elements that each practitioner brings.

Reflecting on my practice, building a vision

This exercise is a space to pause, reflect on the work you have done so far and integrate that, as well as identify some of the areas you wish to focus on in your own development as a practitioner.

To begin, recap the question that you formulated at the start of the workbook in the first process *Starting with self*. Also spend some time reflecting on the work of this whole section – *Approaching* – especially the answer you came to in response to the question 'what is development?' and the working model you devised to describe your approach to intervention.

Then, think about your current practice. Think of the way in which you undertake your work. Ask:

When do I work reflectively and responsively, guiding what emerges?

When do I work 'from the outside', relying on models and prescribed plans?

Generate a list of the strengths and weaknesses of your current practice.

Then, moving on from this assessment, spend a bit of time imagining yourself five years into the future. Visualise a specific instance in which you are working as the kind of development practitioner you wish to be. Give yourself the time to imagine the setting, the people, the particular instance in which you are working. Allow the environment – its colours, shapes, sounds, smells and textures – to be a part of what you visualise, as well as the mood and feeling of the situation.

What kind of development practitioner do you see yourself being? Describe the issues that you are working with, the kinds of problems and difficulties you have chosen to assist with and the particular contri-bution you bring. Describe what guides your practice. Describe the way in which you are working – your manner and abilities, and the qualities that your practice expresses. In the specific instance that you are visualising, what is the ideal outcome of that intervention? Spend some time drawing, and expanding this vision using colour as well as pictures.

Share the drawing and thinking behind it (including your self-assessment) with your speaking partner whose job it is to characterise the practice. (See the box on characterisation on page 12). In your response to the characterisation, you may find that something has clarified or changed in your vision. Make a note of this. Also, identify the important changes that will have to be made in your practice – both in the way you conduct it as well as

the circumstances around it – in order to accomplish the essence of this vision.

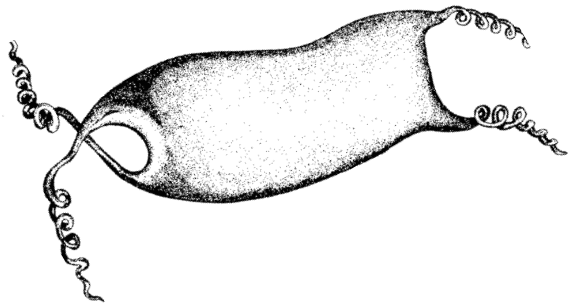
Finally, and in conversation with your speaking partner, go back to your question from the first process and spend a little time considering whether it has shifted or developed in any way. Make a note of this.

Using this exercise with others

This exercise is a variation of a visioning process. Not all approaches to visioning would put it mid-way in a process. In conventional strategic planning, the vision is developed at the start of an intervention. Out of that strategy, aims and a programme of action emerge, all connected to the original vision. In the approach used here, the vision is a point through which the development process passes.[18] Like our questions, our visions may develop over time too, thus they become touchstones to which we return occasionally throughout a journey, rather than fixed aims towards which we must steer. Used in this way, visioning can become a part of a living and dynamic process.

Used with a group, introducing personal visioning some way into a process can be beneficial as there is already a level of trust and mutual understanding in place. This allows for a certain level of honesty (with oneself and others) that might not be possible at the start.

Intervening



'Intervention' is a dynamic and constantly evolving part of the developmental process, encompassing both those periods of greater engagement and those of greater observation. It also incorporates both the start and the end of the relationship within its ambit. When we intervene in this broadest sense, we base it on the understanding of development and change that we bring with us – our approach.

In this section – *Intervening* – we offer a practical exploration of the requirements of each element of the developmental intervention. It can be seen as the 'practical', or 'applied' aspect of this disci-pline. In pursuing these requirements, we have emphasised, again, the demands that are made on the person of the development practitioner. We are not offering a digest of the many skills that developmental practice requires – rather, we focus on those qualities that are demanded throughout the process.

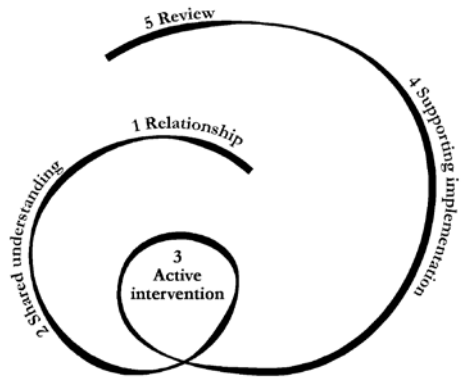
The element of warmth – of human relationship and connection – brings life to our processes and demands an ability to work confidently, with generosity and kindness, and also with clarity about the boundaries of that relationship and its constantly changing nature.

The element of air – of seeing through and from above – demands other orientations. Here, we are challenged to listen, to observe, to see and to understand the meaning of things. When seeing, we are a bit apart, somewhat distant from that which we observe. These are abilities that should be ever-present in the course of the developmental intervention. Even while we are engaging more closely, our ability to see is required.

With the element of water – of facilitation – we are faced most pressingly with the task of self-understanding and of compassion combined with clarity of purpose. It is at the point at which we are asked to help another, or others, pass through their own thresholds of change, that we are most challenged to face how we have dealt with our own. Group facilitation techniques and ice-breakers aside, when faced with the moment of transition, the real task is to hold oneself present and steady, even while there is great turbulence and confusion all around.

Finally, the element of earth – of accompanying and supporting the ongoing change process – demands an ability to stay with a situation, even while attention might wander, or other demands become pressing. Here, the steadiness that begins with the facilitation of change consolidates into a presence, a reliability and availability to walk the path, and then, the judgement to know when to leave, to enable closure or precipitate a new cycle.

It is into these four elements and their accompanying qualities and emphases that we now delve.



Fifth process: Meeting – the developmental relationship

In this process we explore what being in a developmental relationship demands of the practitioner. As we described in the third process *Intervening in development* where an overview of the developmental inter-vention was offered (page 25), the first step, and an essential ongoing element of the intervention, involves the building and maintenance of a relationship between practitioner and client. Characterised by warmth, acceptance and trust, this rela-tionship is an essential requirement for further work – be it the building of capacity, changing of behaviour or organising to-wards achievement of a goal – to have lasting effect.

At the same time, this element of the intervention is also where initial agreement is reached on the aims and terms of an intervention. This might be done through a formal and protracted negotiation process ending in a written contract; it might be done through a once-off conversation in which clarity is established. In whatever way agreement on the terms and aims of the intervention is reached, it is important that an initial agreement is made.

Establishing understanding, and possibly supporting this through re-contracting, is an ongoing feature of the developmental relationship.

Thus, the establishing of a developmental relationship right at the start of an intervention involves both openness and boun-daries, both warmth and clarity. This process explores the demands that this phase, and its different qualities, makes of the practitioner.

Qualities in developmental relationships

This is a reflective exercise that explores some of the key qualities required for relationships in developmental work.

To begin, think back to a situation in which you believe that your development as an adult was guided (but not forced), through the deliberate intervention of another person. It need not have been through the intervention of a development facilitator. It could equally have something which happened as a result of an interaction with a colleague, a friend or partner.

Once you have this situation in mind, think of the circumstances leading up to the intervention. What was present in your relationship that made it possible for the intervention to succeed? How would you characterise the relationship between you and that person? Then, note the qualities and behaviours that the person intervening had brought to the relationship.

The thoughts in the next box have emerged from processes concerned with the qualities and behaviours we bring to developmental relationships.

Working with some qualities

Trustworthiness

What is the most appropriate intervention at this time, with these people, in this place?[19]

Finding the answer to this question depends on good relationships. It is not so much about knowing what to do, but about knowing the other and their circumstances. To know the other, we need trust and intimacy. From this, direction emerges.

To build trusting relationships, our behaviour needs to be trustworthy. We need to ask ourselves:

In what ways am I trustworthy?

Am I able to see, and acknowledge that there may be things that I do not know, and cannot know, for now?

Am I able to admit uncertainty?

Who is my client?

Does everyone involved in this process agree on who the client is?

All too often, our intentions are excellent; our trustworthiness is established internally, yet our behaviour, what the outside world sees, betrays these best intentions. Ask:

Do I do what I say I will do?

Is my behaviour congruent with the values I claim and promote?[20]

From keeping simple deadlines to working with respect and care, our best intentions should manifest in our visible actions. Reasons for broken promises are seldom as significant for the client as the fact that promises have been broken.

Credibility

Out of demonstrated trustworthiness, credibility is built. Ask:

What do I offer and promote?

Am I going ahead with this intervention because I feel, for whatever reason, obliged or compelled, or am I doing it because I can contribute something of value?[21]

What am I asking of people?

Am I asking something that leads, necessarily, to denial or deceit?

Given what I know about the situation and my profession, is this realistic, or is something else required?

Empathy

The important distinction between empathy and sympathy applies here – we aspire to feel with the other, but not to pity, to belittle or to minimise. To fall into sympathy deprives the other of their experience, and so the opportunity to learn and grow from it. While sympathy is an expression of one's own feelings and responses, empathy involves a deep connection with the experience and responses of the other, without taking these on oneself. There is a connection here too, to respect. Insight without empathy can easily become callous observation, devoid of warmth or care, indeed, devoid of respect. Out of an empathetic engagement with a situation we can ask,

What is really going on here?

What does the situation need?

Are my insights cold, or are they accompanied by care for the situation in which my client finds itself?

Use your feelings as a way of gaining understanding. Instead of putting your feelings and responses aside, ask:

What do my feelings tell me about how the other might be feeling?[22]

What do my feelings tell me about the emotional climate of this situation?

Truthfulness

The four qualities presented here – trust, credibility, empathy and truthfulness – are all connected. Truthfulness in this sense concerns an emotional quality as opposed to simple facts and so-called 'hard truths'. The real challenge and value of truthfulness lies not in pursuing 'truth' in hard, pure isolation, but in one's ability and commitment to facing up to reality as it presents itself, and to accompany others through the process of discovering truthfulness for themselves. Ask:

Is what I am doing or saying enabling my client to meet their situation truthfully? [23]

Ask yourself:

What qualities stand out for me as absolutely necessary to my own ability to work developmentally, in relationship?

Write these down, and the reasoning behind them.

Then, and as a third step, think over your practice and find one example in which you feel you have worked well with these qualities and another in which you feel you have not been true to them. Describe each of these examples to yourself in some detail. Then consider:

What helps me bring the qualities I think are necessary to my working relationships?

What hinders this?

Write down your ideas.

Once all of this work has been done, spend time with your speaking partner. In your sharing, focus on what you consider important in establishing developmental relationships, and your assessment of your own abilities to work consciously and constructively in relationship with others. Swap roles.

Finally, when you have each had a turn to share, and once you have completed the conversation, each spend a bit of time making an expanded list of the qualities that now stand out as crucial for you in developmental relationships. Note the words you have used as well as your thoughts around them.

Using this exercise with others

This exercise, and many others in this workbook, is based on a cornerstone principle of experiential learning – that much of what we 'need' to know lies dormant within us; that learning is as much a process of remembering as it is of taking on new ideas; that if we tap into what we already know, if we unearth this, we are far more amenable to new ideas than if we just pile new ideas on, with no regard for what already exists. This exercise and variations of it are particularly valid and useful in social process work as human experience – memory, behaviour, feelings, ideas and relationships – is the very basic material that we work with.

Surfacing experience of intervention work can happen in two ways, both of which are used here. First, we looked at it from the point of view of the recipient of an intervention and then from the point of view of the intervener (and both points of view are found in one individual). It is always hard to really look at yourself, particularly when you have been the active party, so having your perspective as the recipient of an intervention is a useful way 'in' to reflecting on yourself as the active party.

Working with others, a reflective approach that surfaces own experience is always useful, and particularly so at the start of

a theme. Working in a group situation, and once individuals have worked with their own experience, it helps to 'lift' the ex-perience from an immediate personal one to a broader one by introducing other ideas (as we have done here with the four qua-lities of trustworthiness, empathy, credi-bility and truthfulness).

Alternatively, the ideas that emerge from out of the group's reflection can be grouped and organised into themes, then presented back to the group. This will also help participants think about the theme in a new way. If time allows, the group itself could do this organising of ideas as an activity in its own right, and there could be open discussion on the meaning and value emerging from the themes.

The last round in which the individual returns to consideration of the question as a direct personal question for his or her own practice is an important part of the exercise. This is when its objective is brought 'home'. Writing this down is a useful way of confirming the learning.

In a group situation, intimate sharing takes place in listening twos or threes, and should not be requested in the plenary. However, general learning about the qualities required for developmental relationships should be shared in plenary, as well as any comments the group has about the exercise itself.

Assessing myself on a relationship spectrum

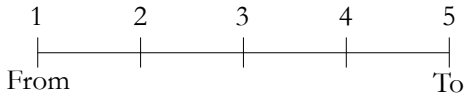
This exercise moves on from the purely inter-personal qualities needed for developmental relationships and looks at the developmental relationship in context of the pressures and realities of a working environment.

Many factors – including individual qualities – shape the developmental relationship. In a work environment, the terms of a relationship are often, in part, determined by circumstances beyond individual preference or control. The reality of the developmental relationship is that it is shaped through the interplay of a range of factors, including individual approach, working environments, circumstances of the client, and everyone's relationship to the resources available to support the intervention. There is no absolute, or perfect set of circumstances for deve-lopmental work. What is at stake, really, is how we deal with the circumstances that we find ourselves in.

To do this exercise, read through the following pairs of statements. Each pair consists of two ends of a spectrum, neither one describing a reality or an ideal. One side describes purely developmental features and on the other side is the extreme of

the conventional project-based approach to development work.

For each set of statements draw a scale like the one below. The first time you read through the statements, use a colour pencil and shade roughly where your working relationships are currently at on this spectrum on the scale of 1–5. When you have done this, read over the statements again and, using a different colour pencil, shade roughly where you would like them to be.



1. *From* 'I am free to negotiate the terms of my working relationships with my clients and in terms of their needs, free of any external constraints or pressures' *to* 'I work on fixed-term projects/ interventions; objectives and deadlines are built in from the start'.
2. *From* 'I work in a generic way, drawing on other expertise as the need determines' *to* 'I offer specialist solutions or contributions'.
3. *From* 'I have an overall approach, but the precise methods and tools are determined as the intervention progresses and according to the needs that emerge' *to* 'What I bring to any situation is my particular intervention methodology/ project cycle expertise'.
4. *From* 'My role is to accompany my clients on their path of development' *to* 'My role is to ensure handover of a resource and monitor its proper use'.
5. *From* 'Together with my clients we establish what needs to be done and devise a plan out of that' *to* 'I implement within a framework of plans that has already been drawn up'.
6. *From* 'Criteria for monitoring and evaluating are devised mutually and are a part of the intervention process' *to* 'Criteria for monitoring and evaluating the success of an intervention are a part of what I bring to the situation'.
7. *From* 'My aim/ my employer's aim is to work in support of the aims of those I work with' *to* 'I work through others to achieve my aims/ my employer's aims'.
8. *From* 'I work with existing capacity' *to* 'I build capacity'.

When you have done both rounds of shading, join your speaking partner and compare pages. For each of you, consider if there is overlap between current approaches to work and preferred futures, or if there are gaps between what is and what is desired. What does this say about your working life? Try to characterise for one another how each of you works currently in relationship and how you would like to work. Then, taking one at a time, explore what is preventing you from creating the kinds of relationships you would like to work with and/or what is enabling things to be as they currently are. Make a list of both enabling and inhibiting factors. Identify one or two of the inhibiting factors that you *could* begin to work on, and what this work might be.

Using this exercise with others

This exercise offers people an opportunity to expand their understanding of a whole spectrum (in this case, a spectrum of relationships in development work) and engage actively with their own experience too. Without giving 'input', it maps a range of possibilities and so opens them up. Using this exercise with others offers an opportunity to see oneself in comparison to other possibilities and can give encouragement, inspiring appreciation of future possibility.

It also suggests that there is more that we can do to change situations than we might currently imagine possible. This expresses a key value of this approach – that at the very least we are responsible for the approach and attitude that we adopt in the face of the circumstances we find ourselves in.

Reflecting on a current relationship

This is an opportunity to work with some of the concepts and processes in the moment; to look, together with your speaking partner, at your relationship.

Get together with your speaking partner and, together, construct an account of the key events in your relationship since starting work on this workbook. Then, using this shared account as a basis, take some time for each of you to think over the following:

Thinking about your experience *as* speaking partner, that is, the speaking partner who receives, engages and responds:

What are your strengths and weaknesses?

What kind of a speaking partner do you think you are?

Thinking about your experience *of* your speaking partner, that is when he or she is receiving, engaging with and responding to your presentation of work and self:

What do you appreciate; what do you find difficult in your speaking partner's approach? Identify some concrete examples that illustrate these points.

What do you think you bring (as presenter of work) to the relationship that helps and hinders your own progress?

Get back together, and for each of you, follow this process:

1. One of you starts by sharing your assessment of yourself as speaking partner.
2. Your partner responds with his or her thoughts and experience of you as speaking partner (including that person's sense of the role he or she plays in the relationship).

3. Together build a picture of how you – as the speaking partner who receives, engages and responds – work in relationship. Include both strengths and weaknesses.
4. Then, and when you have both had a turn to share in a self-assessment of each of you as individuals, look together at your relationship as a whole, as a single social phenomenon:

If you were an outsider, looking at the relationship between the two of you, what would you see?

What kind of a relationship is it; what, together, have you created? Does a particular character emerge?

In doing this task, have any silences in your relationship come to light?

Out of this conversation, do you find any changes that you wish to make, or confirm any ways of doing things that you particularly value?

Using this exercise with others

This is a very powerful way of working and can result in enormous learning. However, doing this exercise with anyone (or a variation of it – wherever direct feedback is involved) requires a very clear objective.

It can be useful in situation where colleagues or participants are being helped to work more openly with one another and everyone has willingly agreed that their task is to develop new practices. It is a direct and directive exercise and is not helpful in situations of conflict or as a data-gathering exercise or when people are obliged to be in the process, for example when they are 'sent' for training.

Even where everyone has chosen to be a part of the process and is keen to learn new ways, this exercise should only be used some way into the process, once high levels of trust and comfort between the people have been established.

In a larger group situation, the detail of feedback should never be shared with the bigger group, although it can be illuminating to hear the joint characterisations and conclusions which emerge. It is also a good idea to give people space to reflect on their experience of the process without feeling any pressure to divulge any of the content.

Sixth process: Seeing – observing the situation

This element of the intervention – that of coming to see a situation – is characterised by the element of air. Through the medium of air, we achieve clarity of vision and of insight, we can lift ourselves, gain an overview – formulate perspective 'from a bird's eye view'. Like the other elements, this one pervades the whole intervention (we are constantly making sense of what is happening, constantly trying to

understand and form a picture) and is simultaneously a discrete phase in very many interventions.

In fact, in development work within the development sector, this phase is amongst the most specialised and the most professionalised. While fieldworkers are tasked with the messy and difficult job of facilitating transformation, with barely a thought given to their professionality, the element of 'seeing' is peopled by highly qualified researchers and technically proficient evaluators. It is not uncommon in development work for research to be valued both financially and strategically over fieldwork and 'implementation'. Researchers help form policy, fieldworkers implement it 'on the ground'.

Another reason for the valuing of 'seeing' over 'facilitating' is that research – as an end in itself – is easier to control than open-ended intervention work. It is easier to account for money spent on a research project (with recommendations at the end), than it is to account for implementation of those recommendations (where invariably, things deviate from the neat path that was derived from research findings). As a result, we live in a world in which we understand a great deal more about how things are than we know about the practices that will help change these realities.

Given this abundance of method and expertise in the element of gaining understanding, what are the essential abilities that the developmental practitioner needs in order to intervene effectively? This process examines some of these. They are less concerned with research methodology; more concerned with the abilities and focus that we must bring to apprehend the social situations that we aspire to intervene into – through researching, or talking, or facilitating, or simply walking alongside our clients.

Listening

Out of all the skills, probably the most important, generic skill in coming to understand a situation is listening.[24] When we listen deeply, we are not simply 'getting' information. We are actively expressing receptive and non-judgemental qualities, themselves central elements of a deve-lopmental practice. In fact, it has been observed in many processes over the years that the more deeply people feel they have been listened to, the more likely they are to speak clearly, directly and openly. Deep listening is a direct way to build trust and therefore a core skill in development practice.

CDRA has, over the years, used two simple exercises for deepening one's appreciation of listening and for improving one's ability to do so. Repeated regularly, and adapted to various

environments, these two exercises lay the basis for the kind of listening needed in effective development practice.

'I hear you say . . .'

To begin, identify an issue that is important to you and that you feel you would like to discuss with your speaking partner.[25] It need not be of professional interest – it might just as well be a personal matter. Give yourself a little time to prepare and then spend a few minutes telling your partner about the issue.

The speaking partner's role is to listen. Once you have finished speaking (in one go, this is not a conversation), your partner reflects back to you just what he or she has heard – no interpretation, no judgement and no advice. Of course, this reflection will not be a verbatim account, but the bare basics of what you have said must remain intact in the speaking partner's version of what you have said. The speaking partner begins by saying

I hear you say . . .

Once your speaking partner has finished, you might need to help him or her a little, correcting or adding to the account and letting the person try again. By the end, your speaking partner should be able to reflect back – to your satisfaction – a precise account of the content of you have said.

When you have each had a turn to speak and reflect back, have a general discussion about the things that assist effective listening and the things that inhibit it. These might be things in the environment, or things in the speaker or in the listener. Make a note of those that stand out for you.

Three levels of listening

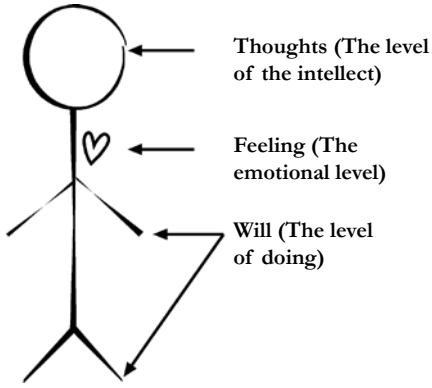
First, have a look at the framework below for describing the different levels at which people express themselves, and so the different levels at which listening should take place. This model suggests that if self-expression comes from different parts of a person, then we need to be alert to all of those parts, and we need to be aware that the different parts might be saying different things.

Levels of listening: A model and an explanation

To be effective listeners, we must learn to listen to the whole person – not just to the words he or she is saying, but also to what the person is trying to say and what lies between or behind the actual words.[26]

We need to listen to *thoughts* – facts, concepts, arguments, ideas and the principles behind these; to *feelings* – emotions, mood, experience and the values behind these; and to *intentions* – energy, direction, motivation, the *will*.

Inasmuch as we are challenged to listen at these three different levels we are also challenged to express ourselves more clearly from these three levels.



The thinking level

This is the most obvious way to listen. It appears to be 'objective', but it is not as effective as we imagine. Can we truly follow with our own thoughts and the thoughts of the speaker? We think much faster than he or she speaks. How do we use this extra mental time? To build a picture and digest what we are hearing, to listen more deeply, or to think our own separate thoughts or to construct hasty replies? How often do we have to call ourselves back from a daydream or a rehearsal of what we are going to say next in reply to the speaker?

It is clear that we have problems of attention and accuracy when we listen, but difficulties also arise from the different *frames of reference* held by speaker and listener. Our knowledge, concepts, vocabulary and way of thinking derive from the *past* – our own, individual past education and experience.

If we do not allow for the fact that the other person has his or her own (perhaps very different) frame of reference, it is all too easy to get our wires crossed, or to assume a level of understanding which is not real. We continually run the danger of over-complicating or over-simplifying what we hear. We have all had the experience of talking to someone and then hear them say, 'I know just what you mean' and then go on to describe something unrelated to the conversation.

The listening process is supported on this level of thinking by the cultivation of *a genuine interest* in where the other person is coming from – an open-minded approach which does not judge his or her words according to your own preconceptions – by listening non-judgementally.

The feeling level

Listening to feelings can give us important clues about what really matters. Strongly expressed or strongly denied feelings can provide fruitful entry points to key issues that lie behind what people are saying.

Listening on this level means penetrating a step deeper into the speaker's experience. Apparently rational statements may be covering feelings such as distress, anger or embarrassment. These may be 'heard' more through the tone of voice, facial expression or gesture than the words uttered by the speaker. For this reason, eyes are also useful tools in the listening process! Even strong emotions can be hidden, especially if we are not used to, or are shy about, expressing feelings openly and honestly. It is also important to 'listen' to silences because they powerfully express the feelings of the speaker. Silence may express feelings of disagreement or inadequacy, boredom or anger.

When we listen, we need to be aware that the message from the speaker does not land on untilled ground. Certain people, situations and issues cause a strong reaction in us because of our own unresolved feelings from our own experiences. This can block our ability to listen to the words and feelings of the speaker. When we calm our own reactions and stop them interfering with our ability to listen sensitively, we can develop the quality of empathy.

Empathy means putting ourselves in the speaker's place and understanding what he or she is saying (verbally and nonverbally) from that person's point of view. Social sensitivity – an essential skill for successful negotiators – depends on the ability to empathise.

The will level

If the *will* does not shift, nothing will, so our ability to read the will of a person or group is a prime enabler of our ability to work at that level.

To sense the real intentions of another person, what they want, why they are telling you this or that, can be one of the hardest aspects of the art of listening. Often, speakers are themselves only dimly aware of what they actually *want* in a situation. Skilful listening can help to discover what lies 'behind' the thoughts and 'below' the feelings of the speaker. These hidden levels are the real sources of potential energy and commitment. This will often involve sensing what is left unsaid. The future lies asleep in people's will-forces.

One impulse of the will which is only too quick to awaken is the urge towards exerting power and engaging in conflict – to impose our own will and resist submitting to the will of others. Resistance at the level of intention is often rationalised into arguments which can never be resolved, because the basic will to reach agreement is not present. If we allow these conflicting forces to arise in us whilst listening, we create an immediate barrier to a creative future work relationship.

If we can hold back 'my way' of acting in the situation, and continually look for elements of common direction, understanding and experience, we may be able to open the way towards future co-operation.

Once you have given this framework some thought, again as with the exercise 'I hear you say…', prepare your thoughts on a topic that is important to you and that you wish to share with your speaking partner. It need not be of professional concern – it could just as well be personal – but it should matter to you.

When you are ready, speak to your partner about the issue. Again, the partner's job is to listen, but this time the person is not just listening for the literal substance of what you are saying. Now the partner needs to listen at all three levels – thinking, feeling and will – to try to understand, com-prehensively, what it is you are saying. When you have finished speaking, the speaking partner can reflect back what they heard (and did not hear) at all three levels. For example:

'You said you will be starting a project but you sound angry . . .'

Some of what the partner says he or she has heard may come as a surprise, or new insight to you. Your role in receiving the feedback is to hear it, weigh it up, and see if it resonates with anything that may be in you. This can assist you in getting into touch with parts of you that are not quite conscious. In an open conversation after the feedback has been given, see if you can reach a common understanding of what was said.

After you have each had a turn, look over the exercise and make a note of the ways in which listening at three levels can assist you to gain understanding of situations that you may encounter in your practice.

Using the exercises with others

Both of these listening exercises are enhanced with the addition of a third and even fourth person in the listening rounds. For 'I hear you say…' a third person can watch the whole exchange and offer useful insights purely from an observer's point of view during the discussion about things that help and things that hinder listening. They can also keep an eye on the listener and help him or her focus on reflecting back what was said without interpreting, judging or advising.

For 'Levels of listening', the levels can be divided up amongst three people, so that each person is assigned to listen only to thinking or to feeling or to will. This adds great variety to the feedback to the speaker, helps discipline listening even further for the listeners, and sharpens perspective during the de-briefing conversation. It also assists participants to better understand what listening from the different view-points entails.

For both of these variations, careful attention needs to be paid to time and rotation of tasks. This is to ensure that everyone gets equal time to speak and be listened to, and also so that everyone gets a chance to play each role.

The content in these exercises can be simply 'talk about something that matters

to you' as has been suggested here. However, they can also be introduced in the course of another process, for example, when problem solving on a particular issue with a group or organisation, or to intro-duce a topic during the course of a training programme. Doing this adds specific content to the listening exercise. If you do this, take care to debrief on both the process – that is, the listening process itself – as well as the content, in two separate rounds. Also, while these exercises work well with content, they should still be tackled from a personal point of view. In other words, if the exercise is being used in the course of a restructuring process, the task could be to talk about 'how I see this restructuring' not 'what is re-structuring?' If the exercise introduces a topic in training, the task should be, for example, 'My approach to writing is . . . ' not 'Professional writing is . . . '

Finally, these exercises aim to access personal feelings and experiences. If you do them with small groups, and with clear boundaries, you will be able to establish high levels of intimacy and trust. However, when running these exercises in larger groups, take care to ensure that this trust is not broken when reporting back to the plenary group. Usually, it is a good idea only to ask for comments on the process. Ensure that the content of individual discussions is not shared in plenary.

Observation

Like listening, observation is as much about qualities, a stance, an attitude to your environment as it is about particular skills. It cannot be learnt – or even improved upon – through going through one set of exercises. Rather, observation needs practice and discipline and a continuous awareness. There are many observation exercises. Most of them are very short, and all are aimed at raising awareness and opening up your sense of possibility – your sense of what can be seen if you set aside preconception and hold yourself open.

The following exercises are among the most helpful that the CDRA has used over the years.[27] In different ways, all of these exercises emphasise a key principle in this approach to developmental intervention. In order to truly understand something, we need to observe its visible characteristics – the surface phenomena – and then go beneath those, and look more deeply at what these might mean. Meaning is not always self-evident in what we see. Nor is it purely subjective – we need to pay atten-tion in order to really grasp what is happening around us. Observation is a practice in its own right. This allows us to see situations more fully and minimises 'knee-jerk' subjective reactions.

Just pausing to observe brings in a certain quality – a stillness and a regard – which con-veys a certain respect for whatever is being observed. Simply to stop to observe is an achievement in its own right. Making sense of that observation, using it to enhance understanding, is another achievement.

Walking about

This exercise is so simple, it feels almost unnecessary to call it an 'exercise', yet it is only when we observe, consciously, that we realise how little we do it, how little we actually exercise our faculty of observation.[28] This enables us to realise how much of life passes us by without being observed at all. Yet the very ordinary happenings that go on around us as a part of everyday life are also a rich source of understanding and insight for us as development practitioners.

To practise observation in this way, choose a place to be with your speaking partner. This might be a forest or a beach, it might be a building, it might be a street or a village. It does not matter as long as you are in the same place and are able to move around freely. Agree on how long you will spend walking about and observing. Then split up. During this time, you should not speak to anyone or write anything. You are simply practising observation by walking about. Your task while walking is to observe and absorb as much as possible. Practise *noticing*.

Look at the physical environment, what is there in nature, what is there due to human intervention?
What are the colours and shapes that you see?
What is the smell, the temperature, the texture of things?
What is cared for? What is not cared for?
Who else is there?
What are they doing?
What are the sounds that you hear? And are the tones hard or soft or something else?
What is the feeling of the place? Is it calm, stressed, industrious, sleepy?
Are there rhythms that you can see? Are things changing in the time that you are there?
What do you see?

Then, look inward at your responses to all of this. Do not try to suppress these responses, but do try to separate awareness of these responses from awareness of this environment.

What are you feeling?
What are you drawn to in this environment?
What are you avoiding?
Where have you not been, yet?
What is this environment telling you about itself?

Allow a picture or metaphor of the essence of this place to form for you and characterise it. Then ask:

Does what you have observed and characterised leave you with any questions about this place?

At the appointed time, reconvene with your speaking partner. Describe, first, what you observed. When you have finished this synopsis, share your characterisation of the place and also the questions that you found. Swap roles. When you have each had a turn to speak, compare observations, characterisations and questions. What does this comparison tell you about focused

observation as an activity in its own right? Then explore briefly:

What helps, and what hinders observation?

Looking at leaves

This exercise challenges us to look further and more precisely than we might think is possible.

Choose a leaf, any leaf, from a nearby plant and pick it. Between you and your speaking partner, take turns to say something about the leaf, for example, 'it is green', 'it has a serrated edge'. You might find yourselves running out of ideas after a while. When you reach this point, press on. See how much further you can go, each time saying some-thing new. You might surprise yourselves. This exercise can be run in a large group. As facilitator, you can send the leaf around two or three times, and each time, challenge the group to observe even more closely.

Another possibility is to collect a pile of the same kind of leaf. Select one. Look at it closely, put it back in the pile, mix the pile up, and then see if you can find it again.

Advice for a friend

This exercise can help access 'culture' – the invisible, yet very powerful norms and habits that whole groups, including organisations, create and sustain. Culture is 'the way we do things', sometimes despite conscious intent or decision to do otherwise. Sometimes, despite our best conscious efforts, we are not fully aware of the culture – the given way of doing things – of situations that we are a part of. This can create blind spots in our understanding of those very situations that we think we are most intimate with.

Think of a situation that you know well, from the inside. It might be your place of work, or study, or perhaps your family, or a group of friends or associates. Imagine that your speaking partner is a friend who is about to enter this group (ideally, he or she should not be familiar with the group). What advice do you have to give him or her about how to dress and behave; what to read and talk about; what to drive – or not, in order to give that person the best chance of fitting in? Share these thoughts with your speaking partner.

Once you have finished, your speaking partner should say what he or she has learnt about the group, based on what he or she has just heard. Listen carefully to the image your partner presents. Does what he or she says give you any new insight into the nature of the group? Swap roles.

Using the exercises with others

These exercises, and variations of them, can be used at different points – in intervention processes and in training processes – depending on the broader context of the process. They function as warm-up exercises, can contribute towards team building, and can be a prelude to further work on observation and picture building.

The exercises are particularly useful when helping a group to come to see something in its own reality, for example habits that

are not helpful, or behaviours that cause harm. It may be very difficult or painful to acknowledge such issues. Exercises like these can be used to shift the group from its own experience to direct experience of the practice of observation. Once the people have had experience, as a group, of distinguishing observable phenomena from the meaning given to these, they might be more open to observing, and facing dif-ficult things closer to home.

Double characterisation

At the start of this workbook, we introduced characterisation as a core skill in this approach. It has been used throughout the workbook as the basic means of engaging, both with the world and with your speaking partner. This exercise is an opportunity for you to work directly and consciously on your characterisation practice.[29]

Together with your speaking partner, read over the description of characterisation and guidelines in the first process described from page 9. Then, think of a situation involving several people and events that have occurred over a reasonably long period of time. In other words, a typically complex human situation.

Think about the situation carefully – all of its features, the relationships that go into it, the history that has brought it to that point, its present position and the future scenarios that are emerging. Jot down some of the key points. Then, look over what you have written and formulate your characterisation of the situation. Write that down too.

When you are done, share all of this work with your speaking partner. Your partner's job is to listen carefully, to get fully 'inside' what you are saying. The primary task of your speaking partner at this point is to see whether what you have observed is captured by your characterisation.

Once you have presented, your speaking partner shares with you his or her characterisation of how you observe, describe and characterise. In this way, you will receive a picture of your practice from the outside in. End the round with your final thoughts about what your speaking partner has shared with you.

Swap roles. When you have both worked through the exercise, reflect on your experience of the whole process. Essentially you have revealed your practices to one another and opened them up for scrutiny. What were the things that helped, and what were hindrances in this process? It is quite likely that at this point you might pursue the conversation about your own relationship further, perhaps a continuation of the conversation arising out of the exercise 'Reflecting on a current re-lationship' on page 42. Does anything emerge out of this conversation

– a new insight, a principle – that enlarges your growing picture of developmental practice?

Using this exercise with others

This is a very practical exercise. Participants are asked to put their immediate practice – their strengths and weaknesses – up for scrutiny, and to face feedback. There is no delay here, and there is no avoiding facing oneself. Because of this, it stands to reason that this exercise, and variations of it, should only be used with people where a community of learning has already been established. The tone of the group should be characterised by trust and intimacy, and people should already have had considerable experience revealing themselves to one another.

This technique – bringing practice directly into the training room – is tremendously powerful and can be undertaken in a variety of ways. Working in groups of three, you can follow a similar process which is simpler and more direct than the one described above.

Here, there are three roles and they rotate until everyone has had a chance to play each role. Role 'A' is that of the speaker, who gives a brief account of something – it may be work-related, or it may be personal. 'B' is the person who characterises the situation. The characterisation round ends with 'A' closing and saying what he or she has taken from the process. The person playing role 'C' observes. Once the charac-terisation is over, 'C' offers his or her cha-racterisation of the way in which 'B' did the initial characterisation. 'B' then has the opportunity to close that round saying what he or she took from it. All three then have a chance to say how they found the process.

The exercise proceeds until everyone has had a chance to play all roles. If these triads are part of a bigger group, debriefing in plenary should focus on the process, not the content. It is important when doing this exercise that participants are encouraged to speak about their own experience and learning, not that of others.

Writing perspective

This process, *Seeing*, has focused on strengthening the abilities required to see and hear comprehensively and clearly. Verbal characterisation is one way of formulating and expressing the perspective, or picture, that engaged listening and observation has generated. Practising expressing what one observes and its meaning in writing is another. Writing helps us externalise what we see and, in that process, clarify it further. While human engagement – conversation, process, meeting and interaction – is the

primary medium of development work, writing is the central vehicle for recording observations and outcomes.

To begin, think about your experience of writing – the situations where it is required of you. Also, how you feel about it and what aspects of writing you are good at, what you are not so good at. What do you need to improve on, and why? Make a note of all of these thoughts, and then put it to one side.

Go back to the work you did in the second process on addressing the question 'What is development?' You may wish to use it as it is, or you may wish to work on it a little further. Once you are satisfied with the result, share it with your speaking partner. Also share with your partner the thoughts and feelings you had about your own relationship to writing at the start of the task, how you experienced writing up your thoughts on development, and the thoughts and feelings you are left with at the end.

The speaking partner's role is to read the document and to offer feedback on two fronts. The first is to share the extent to which your partner feels the document adequately conveys your point of view – to give you feedback on your writing. (Your partner must not say whether he or she agrees with you or not – that is not the point of this exercise.) The second is for your partner to speak about his or her observations about how well you seem to have tackled some of the general writing challenges you set for yourself. Once you have listened to this feedback, close the session by noting what you take from it as well as what your next steps will be in relation to developing your writing abilities. This might include continuing working at your writing in the speaking partner relationship. Swap roles.

Using this exercise with others

When working with groups of people who are able to read and write, it can be helpful to introduce a writing exercise, even in the course of a facilitated group process. Wri-ting quietens and focuses the mind, it encourages authorship (and so responsibility for yourself and your ideas) and it challenges people to stretch themselves beyond what they may think they are capable of. Of course, as with any activity in group process that challenges people to distinguish themselves from others, this can be a threatening task. Before using this tool, be sure to carefully consider people's familiarity with writing as a form of expression and whether the group will be able to deal with this potentially threatening aspect of the exercise.

In the case of community development worker, fieldworker and process consultant training, a writing exercise can be both challenging and extremely beneficial. It exercises a core skill required for developmental work – namely the ability to lift oneself out of a situation and describe it as a whole, and dispassionately, even while the work demands intimacy with and close accompaniment of that very situation.

Seventh process: Facilitating through the change threshold

This seventh process comes to the heart of developmental intervention – the point at which we intervene most directly; the point at which we are most in contact with those with whom we work; the point at which we are all at our most vulnerable. It is the point of facilitating another (person or group) to, and then through, whatever change threshold they are confronting at that point in time.

This kind of facilitation can be distinguished from a participatory style of running workshops, meetings and training. When we facilitate through the change threshold, we are intervening directly. We are not simply holding a space into which everyone can have their say (although that is very often an important part of the job); we are not running an agenda on behalf of anyone else (although sometimes facilitation through the change threshold does happen through the medium of a visibly defined task). In addition to whatever tasks and methods we might be undertaking, we are also doing something very particular – helping people to face and take on board the unknown, through letting go of old knowledge, habits or ways of seeing. We are helping others step over existing boundaries, entering and transcending the threshold of change.

In this work, we can only go as far with others as we are willing to go ourselves. Even in relatively 'simple' matters – like asking a group of people to map their history, we will come face to face with the full experience of human complexity – issues of power, authority, identity, self-expression and, always, the massive risk involved in presenting oneself to others. For this reason, the ability to facilitate through a change threshold demands high levels of self-knowledge and self-acceptance.

In our field, face-to-face facilitation often happens in groups, although it does not have to. It is quite possible to facilitate a process with just one other person. In the field of facilitation, much has been written about understanding and intervention into group processes.[30] This seventh process does not address itself to these issues. Instead, we explore the concept of facilitation and the demands it makes of facilitators.

This process has three parts. The first tackles the idea of facilitation conceptually. The second part pursues self-understanding as the single most important ability to be able to facilitate effectively. The third is integration of learning and insight with an emphasis on looking at your own conscious and preferred approach to

facilitation. The structure of this process does not require following a rigid order. As with the other processes, you can be flexible according to your needs, time, circumstances and inclination.

Surfacing facilitation

To begin, think over your experience of facilitating processes and identify two experiences – one where you feel you facilitated effectively and one where you did not. Prepare two short accounts of these experiences. Each account should offer a brief description of the circumstances and issues in the process, and then focus on what you, as facilitator, actually *did* in the situations.

Present these accounts to your speaking partner. Your speaking partner's role is to listen critically to you and then to help you compare the two accounts. Together identify what was different between the ways in which you handled them. Swap roles.

Once you have both presented to each other, work together to identify some features of effective facilitation, as well as some of the pitfalls.

Using this exercise with others

This is a useful way of opening a complex topic and enables participants to get acquainted with some of the issues, from their own experience. However, it can be difficult telling others about what you have done (even where you are quite comfortable working with each other), and so the role of the speaking partner as assistant to thinking (not judge or advisor) should be made quite clear. If this is being done with a large group, only the features and pitfalls of facilitation should be reported on – not the actual stories.

Thinking about facilitation

The following two articles offer complementary views on facilitation. The first, by Sue Davidoff, tackles different approaches to facilitation and identifies the different roles that facilitation can play. The second, by Paul Friedman and Elaine Yarbrough, identifies what it is that we do *when we are facilitating and what it demands of us.*

To begin, read through the first article.

The art of facilitation

'Please remember it is what you are that heals, not what you know.' (Carl Jung)

In one process, involving 70 people, I was tasked with being the lead facilitator – of holding the threads together, of summing up sessions, introducing sessions, ending off the whole seminar and so on.[31] With this task as central in my consciousness, I found myself thinking about what I was doing in a new way, and I began to develop some new ideas and thoughts about the art of facilitation. It goes something like this. I began to notice that there are at least three levels of facilitation.

The **first level** is where one designs a process and simply takes the feedback that comes out of the process design from the participants. Facilitation then is largely the art of appropriate design, where certain processes are designed with certain ends in mind, and participants have the opportunity to go through that process. There is no attempt to mediate meaning, to respond to participants' input, to make sense of much more, or to create something new. I have often observed this kind of facilitation – and it is especially useful for information exchange. At this level, obviously, the most important aspect is the design of the process, asking the right questions and setting in place the right processes in order to achieve the desired outcomes.

The **second level** is where the facilitator takes a more active role in the process. Here she or he responds to the input of the participants, ties threads together, links their contributions with theory, offers insights, shares perceptions and experiences, and helps to make sense of the process. At this particular level, process design is also very important. But what becomes equally important is what happens inside the process, and the kind of meaning that the facilitator can help to shape for the participants. It is in the meaning that is shared between facilitator and participants that strength lies, and in the interaction between the two where dialogue is set up. Good training often uses this kind of facilitation.

The **third level** of facilitation embraces the previous two, and also goes a step further. At this level, the facilitator takes the process into a conversation where meaning is lifted onto another level for both facilitator and participants. Here the process takes on a quality where those involved are almost stepping outside of the situation to have a look at it from the outside in, and then returning and looking, together, at it also from the inside out. Understanding is shaped and meaning created by all stepping outside of the process.

It is as if there is a stream of consciousness that underlies any process. The task of the facilitator – working at this level – is to tap into that stream of consciousness, the particular meaning that is lying there at an unconscious level, and to help to make it conscious for and with the participants. It is really about working with the invisible

dimension and trying to make it visible – for ourselves and for the clients with whom we are working.

If we can accept that we, as facilitators, do not 'make development happen' (because it is already happening), but rather are helping to make the development process more conscious, with all its challenges, crises, obstacles and opportunities, then it is possible to recognise that our task is to listen at that deeper level, to hear the questions, the possibilities, the direction that is suggesting itself, and to help, through the process, to make that more conscious.

This requires such fine-tuning of ourselves as facilitators: if we are to accept that something is moving anyway, and our task is to 'read' it, to understand it, and to reflect it back to participants in a way that lifts their own understanding in such a way that they can see it closely and at a distance, then we can truly see ourselves as instruments of something much greater than *this* moment or *this* group. It is also not merely about reflecting back to participants, but also about critically engaging in the emerging picture and the various possibilities. Hence the importance of our own self-development as facilitators of such processes.

It is, I believe, what we really mean when we talk about *self-understanding*: It is something which I am beginning to understand on an entirely new level: facilitating self-understanding is creating spaces where meaning is lifted out of the immediate and placed on a level where people can see it from a vantage point; where their reality starts to form a coherent picture; where metaphor illuminates current reality; where the whole is able to be seen, held and understood. How do we create spaces where conversations take place where people really hear one another, listen to the underlying currents, observe finely what is taking place, and build a shared understanding together?

At this level of facilitation, asking the right questions is very important. Process design is also important, but most important of all is the careful listening skills of the facilitator in being able to lift out the meaning that is emerging, and helping to make this conscious for all. Workshop design is merely a vehicle for what happens inside the process itself.

From the above exploration, what I have come to understand is that what we are trying to develop, is **active** facilitation. By active facilitation I mean understanding the different levels of facilitation, and recognising that, if we aspire towards the third level, it means that we are working at both an interpretive and critical level, which means that we are not merely passively running processes, but engaging in the meaning of it at all levels. This assumes that we recognise that ultimately it is the meaning that participants are able to make of their own situations which will be the spur to change – or not. Our (active) role, therefore, is of mediating meaning and self-understanding, which is an active role, based on values which we accept as part of our essence.

When you have finished, consider what this article has prompted for you in your thinking about your facilitation.

Can you identify your approach to facilitation in the description here?

At what level do you facilitate processes and under what circumstances do you shift levels?

Then read through the next box, extracted from the work of Paul Friedman and Elaine Yarbrough.[32]

Facilitation skills

A model of facilitation

Orientation	Skills: Observation	Skills: Intervention
Soft	Noticing a range of verbal and nonverbal cues of self and other; noticing group themes, patterns, images; noticing incongruencies in communication	Formulating tentative guesses about meaning of behaviour; reflecting behaviours that are observed without interpretation; simply changing a response to a person or group without giving direct feedback
Hard	Pinpointing specific behaviours; interpreting meaning and consequence of behaviour; judging likely outcomes of repeated patterns	Confrontation of specific behaviour; suggestions or advocacy for change; teaching a specific skill; stopping self from a biased intervention

Effective facilitation involves several elements:

1. *A comprehensive orientation to self and others.* A 'soft' orientation is an open, aware, receptive stance, one which increases open-mindedness and flexibility. A 'hard' orientation is necessary for sorting out, categorising and judging information – for narrowing and defining the meanings of behaviour. Comprehensive facilitation includes the ability to use and sequence soft and hard orientations appropriately.

2. *Observation skills for gathering information.* This involves the ability to recognise specific behaviours from which the facilitator can glean the state of mind and modes of interaction of the people he or she is working with. It requires a soft orientation. Skilled facilitators should be fully aware of what observations led to their interpretations, be prepared to describe them, and remain tentative about their conclusions.

3. *Intervention skills for clarifying interaction*. The interventions of facilitators are based on observable information about the interaction of the people they are working with, and the meanings they attribute to those interactions. The act of attributing meaning and explaining behaviour is a hard orientation: it is a more focused, directive approach.

4. *Self-development of the facilitator*. Effective observation and intervention require facilitators to be sensitive to the phenomena and the people that they are observing, and the situations they are intervening into. With greater self-development, facilitators are able to engage in a wider range of work, interact with more kinds of people, and be more able to adapt what they are doing to suit the circumstances.

Facilitation guidelines

a. *Wait*: Learn to recognise your initial responses to others and then wait for more, from yourself and from others.

b. Keep the behavioural and the inference levels of observation distinct. Stay in the present, both observing and processing.

c. Focus on what *is* happening, not on what *should* be happening.

d. Give self and others permission to feel and think what they are feeling and thinking. Acceptance, paradoxically, allows change.

e. Encourage people to take responsibility for their responses. Self-attribution is a basic requirement for awareness, acceptance, and potential change of responses.

f. Be willing to be influenced.

g. Follow and use the energy of the group rather than resisting it.

h. Clarify your own personal feelings and perceptions of the moment so that you do not project them onto others and so you see the responses of others more 'clearly'.

i. Be aware of the tendency in yourself and others to see and feel experiences dualistically. Although people often have contradictory feelings about an issue, they tend to believe that there can only be one way that they *really* feel.

j. Do not make learning about self heavy-handed – people have lived a long time before they met you. Wise humour comes from *watching* self and others, not from *catching* self and others.

k. Focus on and recognise the positive aspects of the contributions of the people you are working with. For acceptance and change, people must know first that

they are worthwhile. Then they will be able to risk the exploration of self which is needed for potential change.

l. Avoid three typical responses that block good facilitation (increasing awareness):

Judging: scorn, laughter, jeering, ignoring, moralising, convincing the other that you are right.

Helping: trying to get rid of 'bad' feelings; saying a person 'shouldn't feel that way' which talks the person out of his or her feelings; reassurance ('It's not that bad'); comfort when it is not needed.

Explaining: telling someone what his or her motives are or analysing why he or she is doing or saying something; communicating that you have the person figured out or diagnosed (which sets up a power struggle over whose interpretation of 'me' is right).

When you have finished, reflect further on your own approach to facilitation.

What skills do you tend to emphasise?
What skills would you like to develop further?

Last, have a look at the following ideas and see if they prompt any other thoughts. All of these have emerged out of processes concerned with the effective facilitation of social process. Focus your answer around the following question:

What does it take to facilitate more effectively?

Other thoughts on facilitation

Asking questions

It is often said that the art of facilitation lies in being able to ask the 'right' question: The right question for those circumstances at that point in time; the question that will help to bring about movement; the question that will help the client take the next step on their own path of development; the question that will help bring truthfulness into the light, restore hope and a sense of agency. How do we develop our abilities to ask the right question? To work with what is living and present, rather than bringing our own agendas? We quieten ourselves. We listen deeply. We allow the situation to impress itself upon us in its full complexity and vivid detail, and out of that emerges, quite naturally; a question, not an answer.

Process design

One of the facilitator's jobs is to help the people see things in such a way that they understand their circumstances better and so are better equipped to make decisions in relation to these. This is not the same as training which involves inducting a group into your own way of seeing and thinking. Training is in itself a worthwhile activity, but it is different to facilitating social process.

Finding a balance between formulaic, overly structured process design and free processes without form is a fine art. It takes time and practice. It helps to seek something that lies between no design at all ('let's just see what happens') and rigid structure ('we can't do that because it doesn't fit into *my* plan'). There are a few things that we fully control – managing the time boundary, seating, deciding who is present in the first place. It is important to pay serious and considered attention to these. Nothing else in a facilitated workshop process can be controlled with any certainty and it is useful to face up to the reality of this.[33]

Even while control of social process is an illusion, it can be helpful to deepen one's appreciation of the process of change and one's ability to 'read' it. The model presented in this workbook, characterising the change process in terms of archetypal elements (fire, air, water and earth) is one way of describing the basic form that developmental change processes *tend* to follow. This process can be kept in mind as a guide when designing whole, long-term interventions that stretch over days, weeks or months as well as in designing shorter meetings and workshops.

Are all the elements taken account of?

Is there warmth in the relationship, the set-up, the space?

How will understanding be built?

Am I adequate to the task of facing change when it presents itself?

Is there time and space to bring about a grounded resolution?

In addition to guiding broad design, this framework is also useful as a guide to understanding what is *actually* happening in a process.

Other kinds of processes might be more prescriptive in what they aim to achieve, and how they go about it, requiring more active and directed design.[34] While working with more overtly goal-oriented processes (for example, strategic planning) it is still possible to remain open to newness, growth, learning and change if you keep in mind that the unknown and unexpected can emerge even in an 'outcome-oriented' process. In a developmental approach, these should be welcomed.

Essentially, facilitation of social process involves stepping into the unknown. All of our best attempts at developing our facilitation abilities are aimed at strengthening our capacities to recognise and work with uncertainty and unpredictability. The ideal process design is one that can be put aside or changed, if the circumstances of the moment demand it, or if the process itself has yielded outcomes that were not anticipated in the initial planning (as they invariably do). Paradoxically, it is easier to give up some of our plans and designs when we have prepared thoroughly. Again: there is simply no substitute for preparation (both inner preparation and thorough planning) when facilitating structured processes.

Using tools and exercises

Tools and exercises are pointless unless you are very clear why you are introducing them at any point in a given process. If people are taken through an exercise (be it an ice-breaker or a complex experiential process) and the facilitator is not completely in control of his or her own thinking about why that tool is being used at that point, the participants will become aware of this and become bored and frustrated.

Do not run exercises unless they make sense to you. As obvious as this may sound, this is an important point, and one that is often overlooked. Ask yourself the questions:

What is the situation asking of me?

What will help?

How do I do it (and will a tool or exercise help)?

Ideally, you should know exercises very well before running them. Of course, there is always a first time, but try to ensure that you have observed the exercise being run by another person and go through it yourself beforehand. There is no substitute for preparation.

Learning to facilitate

How do we learn to facilitate? We cannot learn it from books. Books can engage with, and encourage practice – thoughtful *doing*; they can open new ideas and share learning, but they cannot teach anyone to facilitate. Deepening one's ability to facilitate takes practice, a variety of forms of practice, and is a continuous practice.

Exercises of the sort used earlier in this process are wonderful ways of bringing to light and deepening understanding of discrete parts of oneself. Direct, in-the-moment practice – as done in the processes up to this point – bring practice directly into the workroom and generate the experiential material from which you work. Learning to facilitate also demands research – we seek out those exercises and approaches that

can best contribute towards achievement of the goals of any given process. We try things out, we reflect on them, adapt them and try again. Finally, we can only learn to facilitate if we **do** it, if we facilitate.

Building a practice demands that you build your own collection of resources, keep a record of useful ideas, tools, exercises and notes about things that have worked, and things that have not worked. Working with human beings, we must take very seriously the approaches that we bring and consider, always, the extent to which they can enable movement and also the circumstances under which we introduce them.

It is questionable whether anyone can really learn to facilitate without a practice and without a learning community. We need to be *doing* and we need to be reflecting on and learning from that doing, in relationship with another, or others. Section 4 – *Centring* – addresses itself to some of the continuous processes that we can use to keep learning, in community, about facilitation of social process in particular and the art of development intervention in general.

To close, spend some time alone working with the following questions:

If we think of facilitation as guiding social process – what does that say about what a good facilitator needs to know and be able to do?

What then, does that demand of me as a facilitator of social process?

Share your thoughts on these questions with your speaking partner and swap roles.

Out of this conversation, do you have any new insights into facilitation and the way in which you practice it?

Using this exercise with others

This exercise aims to offer both opportunities to reflect on and learn from experience, as well as input that will stimulate thinking and raise awareness of some of the tenets of this approach to facilitation and development intervention. Like the exercises in Section 2 – *Approaching* – on conceptualising development, this exercise is conceptually very taxing and can well be run over an extended period. In a group process it is highly unlikely that all of this work would be done at once. Rather, it could be run with one reading a day being done and interspersing this work with other activities that are more grounded in experience. As with the exercise on development, this exercise should always conclude with participants having the space to think through what they take on board and resolve to pursue, and what not.

Deepening self-understanding

It is quite possible that your view of what facilitation demands of you, formulated at the end of the previous exercise, includes a need for more knowledge and better technique. It is also likely that you identify personal growth and understanding as necessary contributors to effective facilitation.

Facilitation at its very best enables transformation, a 'letting go of the old in order to take on the new'. Almost invariably conflict and resistance accompany this process of transformation and, very under-standably, conflict and resistance are precisely what facilitators will face as they attempt to enable the process. No matter what techniques at our disposal, we are able to face these turbulent, often difficult, often exciting things that accompany trans-formation only to the extent that we have faced them within ourselves. As has been said more than once, it is a truism in facilitation work that 'you are your own best tool'. What this really means is that all knowledge and technique is useful only to the extent that it is fully integrated into ourselves and our functioning so that our practice in any given moment is an authentic reflection of who we are. To help others let go of the old in order to take on the new, we need to be fully engaged in our own processes of letting go, and this always begins with consciousness, with awareness, with understanding.

We offer the following four exercises focused on inner work as encouragement towards ongoing personal development and cultivation of self-knowledge.[35] Of course, cultivation of self-understanding, like the acquisition of knowledge and technique, is a life-long process. In the realm of facilitation of human trans-formation, it is the single most important requirement.

The chapters of my life

This exercise is a simple biographical process, offering you the opportunity to reflect on your whole life, generate a picture of its significant moments and then engage with it with a bit of distance, to begin to clarify and perhaps make sense of things and the relationships between them.[36] While it is very simple, and may appear un-demanding, it can surface powerful memories, bring about startling insights and help you see new connections.

Ensure that when you start this exercise you will have a good span of uninterrupted time to work through it (no less than an hour). To begin, spend some time thinking back on your life, particularly key events and also phases. 'Map' this out on a piece of paper. You might want to draw a time-line, from birth to the present, or simply brainstorm and see what emerges. Once you have completed this, begin to identify

phases or 'chapters' in your life. If your life were a story, where would the chapters begin and end, and what would their titles be? You could also take this process further and assign colours to each of these phases, with the colours representing the qualities and moods that characterise each period.

When you are satisfied that you have worked 'into' this sufficiently, join up with your speaking partner (who should, ideally, have been working on the same task). Share elements of the story with your speaking partner. It is important in this exercise (and the ones that follow) that you share only what you are comfortable with. You might want to share only the chapters and colours but little detail. You might want to leave out whole chapters. It is up to you. The speaking partner's role is to listen carefully to whatever you present. At the end of your presentation, your partner might ask some questions for clarity, or point out things that struck him or her particularly, but should not push any of this too far.

Swap roles. Once you have both shared, you might wish to discuss the exercise and anything that you have learnt about yourself, in particular, or the process of human growth, change and development, in general.

Sources of inspiration

Moving on from the overview you generated in the previous exercise, this one focuses and seeks out your sources of inspiration with a view to exploring the 'light' side of self, that part of yourself with which you readily identify.[37] In working through this exercise you will be accessing that aspect of yourself which gives you power and direction.

First, and working alone for about half an hour, work through the following questions, making notes as you go along:

1. Think back to your childhood and youth. Can you remember who your heroes were? They might have been figures from popular culture or sports, or mythical characters from a storybook or people who you knew in your ordinary, family life. Who were your heroes? And what made them heroic in your eyes?
2. Try to remember some things, or events, or places that have really moved you. This may be in the recent or the distant past. These experiences of being moved might have happened in response to a piece of music, or something you read, perhaps a view, or a series of events that you witnessed. Describe this situation or event.
3. Think of the times where you have found your 'no', that part of you that stands firm and says, 'I will go no further'. Describe to yourself one or two of the times you found your no in some detail.
4. Finally, imagine that you were the ideal fantasy that you dream of being. This should not be an 'improved' version of what you already are. Rather, this is your dream-self, the ideal you.

Out of all of this work, prepare a short talk on yourself for presentation to your

speaking partner. After listening to your account, your speaking partner should offer a characterisation to you of what he or she heard as your source of inspiration. This might develop into a conversation between the two of you. At the end, and in light of all that has been said, close the exchange by saying what you take from it by way of self-understanding and insight into your sources of inspiration.

The shadow

The previous exercise illuminates and enhances the part of you that is inspired and that you easily identify with. However, people carry inside them a 'darker' side, a side that is not known, a side that is certainly not easily acknowledged or identified with.[38] While we are born whole, very early in life and for all sorts of reasons, certain characteristics become seen and treated as unacceptable. These are put away, hidden from view, and take on a life of their own as what Carl Jung referred to as the archetype of the shadow.

The concept of the shadow offers a useful way of understanding this part of self. These denied and hidden parts are not necessarily 'bad' – the shadow is not the opposite of 'good'. Depending on one's culture and circumstances, the shadow may contain human qualities that are not valued in their own context, yet may be a source of power and energy when seen in another. So, the shadow might carry one's asser-tiveness (manifesting as aggression), or one's vulnerability (manifesting as fear); it might carry one's openness to diversity (manifesting as being easily distracted) or one's commitment to principle (manifesting as rigidity); it might carry one's gentleness (manifesting as weakness) or strength (manifesting as hardness), and so on. The shadow carries as many qualities and as much potential as does our 'light' side.

The more we come to understand our own shadows – those repressed aspects of ourselves – the more we release the inherent quality and value in these to enlarge our potential and capacity for accomplishment in the world. Further-more, and for those of us working in development, we need to come to terms with our own 'shadow' in order to be able to work with the shadows of others. If we have not developed some familiarity with the shadow, we will lack the ability to work in a facilitative way in situations where others are struggling with their own denied aspects of self. Given that facilitation through transformation involves, almost invariably, a confrontation with some or other denied aspect of self (be it in an individual, a group or an organisation), we cannot facilitate unless we have begun our own journey towards meeting ourselves in their totality.

So, identify an issue in your life that is a recurring problem and that you continue to fail to resolve in spite of having tried many times. Choose an issue where you really are 'stuck'. Choose an example which illustrates this problem, one instance in which it was manifested clearly. Then, describe this to your speaking partner. Your description

should be very detailed and convey a vivid picture of everything that happened there. Your partner's role is to listen carefully and to hear the story as clearly and in as much detail as possible, so he or she should listen and ask questions where things are not clear. As your story progresses, cover the following questions:

What did you do in the situation?
What did others do?
What did you lose in the situation, and what did you gain?
Looking internally, who, or what part of yourself was winning?

Here, both you and your partner should work at characterising that part of you that stands to gain from the situation being as it was, from the situation not changing, and this despite the best efforts of other parts of yourself. Your speaking partner's role is to help you to understand this part of yourself as far as you can go, to help you to face the shadow rather than avoiding this confrontation.

Out of this discussion, and when you are satisfied that you have explored this part of yourself sufficiently, discuss what small steps you could begin to take to break the mould, remembering that awareness, greater awareness and meeting of self is the primary objective here. Any changes in your behaviour are likely to come about through this increased consciousness. Make sure that any practical resolutions you follow help to support the change in behaviour you want. They are not an end in themselves.

Swap roles with your speaking partner and repeat the process.

Patterns into the future

This exercise looks at the future, while remaining rooted in relationship and consciousness as primary mediums of development.[39]

Look over the last two years. Can you identify three people who have been very significant to you? These people do not necessarily have to have spent a particularly long time in your life, and the experience does not necessarily have to have been a positive one (although it might have been). However, you should be able to say that your life would have been significantly poorer if you had not met them. Spend some time describing each of these people to yourself, the role they played in your life and what this meant to you.

Then, do the same with three events. These may or may not have involved people, and they may or may not have been happy experiences. The point is that they must have been significant in your life. Describe to yourself what was happening there and what it meant to you.

Our assumption here is that the qualities you find in significant people and events are qualities that you need to meet in yourself, at this point in your own life and development. You are relating strongly to these people and events 'out there' precisely

because they are emerging from inside you. Once you have identified the people and the events, ask yourself of each one:

What is that person, that event asking of me now, in the present?

What attitudes, skills and resources might I find from within myself?

Describe all of this with your speaking partner.

Can you see any patterns in what life has been bringing to you in the last while?

Do you find an indication of what is needed from here?

Explore these questions in conversation with one another and see what insight you come to.

Using the exercises with others

Ironically, even while this phase – facilitating through the change threshold – is the most 'applied' part of our profession, these exercises, aimed at enhancing our abilities to do it well, are the least applicable in our direct work. Generally, these exercises offer a source of insight, clarity and resolve for the prac-titioner so that you are better equipped inside of yourself to work with people and groups on their particular issues, whatever they may be.

Carefully consider the situation when you are thinking of using these exercises with others. Use them only where they are entirely appropriate to the intervention. Participants must be made sufficiently aware of the approach and its depth in order to give their informed consent.

One appropriate use of these exercises is when facilitating practitioner training or development. Practitioners need self-knowledge to enhance their ability to facilitate the processes of others. You can run the four exercises in the same sequence as presented here. However, each exercise is intensely focused on the inner world of the individual. Consider the risk that people might turn inward so deeply that they lose sight of their broader purpose.

Ideally, in practitioner training processes, these exercises can be run over several days and be interspersed with other work, including skills training, conceptual explorations and opportunities to apply the insights to one's practice (as is done in the next exercise on page 70). In this way the engaged personal development required for effective developmental practice is spread throughout a professional development programme. It is thereby also integrated into the ordinary functioning of the programme, rather than being sectioned off as something separate from other, more conventional professional development processes.

More practically, as has been stressed throughout, these exercises demand time

and space to do and more time for their outcomes to be integrated. The boundaries in personal reflection and development exercises need to be held especially well. This means you need to take care with the physical space – ideally it should be a peaceful and pleasant space where there are no interruptions. Time-wise, these exercises can raise issues that appear boundless, so it is important that you provide a time-boundary to contain things. However, the time boundary must be realistic to avoid making people feel pressured and devalued. Generally, each of these exercises takes no less than two hours, and can take longer if they are run with more than two people.

These exercises can be run with more than two people. 'Sources of inspiration' is particularly enhanced by a bigger group as the presenter has the benefit of hearing two or three characterisations and is able to integrate his or her final thoughts out of all of these ideas. Finally, and working with a larger group, space can be provided in the plenary session to come together after doing the exercises. This offers an oppor-tunity for participants to share their comments on the process with others in the group. However, it is not uncommon for these plenary sessions to be quiet and still, with only a few people speaking. That is fine and appropriate, and does not bring into question the value of bringing the group together in plenary.

Consolidating my approach to facilitation

This brief exercise is an opportunity for you to look back at the exercises of this process and to think through how they might impact on your approach to facilitation.

First, think over the four self-development exercises above. Imagine that you were a facilitator of a process that used these exercises. Close your eyes and imagine what the process would be like.

Under what circumstances would you have introduced these exercises?

At what time of the day would you have brought them in?

What would you be trying to achieve?

What is the mood of the situation?

What are the questions and responses that you received to the exercise and, crucially, how have you dealt with these?

Looking at that scene in your mind's eye – can you characterise the facilitator that you are?

Write down your response to the last question. Then return to the work you did in the exercise 'Thinking about facilitation' on page 56. Return also to the vision for your practice that you formulated in

the exercise 'Reflecting on my practice, building a vision' on page 32.

Is there anything that you wish to add to, or change in your formulation of the facilitation practice you are building?

Has anything shifted in your vision for your practice?

Do you need to do anything practically in order to pursue this more directly?

Share all of this with your speaking partner, and note any changes or areas of resolve that come out of this conversation.

Using this exercise with others

This exercise is similar to the visioning exercise done at the end of the process in *Approaching* (page 32). It is a helpful way of connecting with work done earlier in a development process and integrating all of it into a conscious appreciation of the whole. It also simply provides the time for participants to begin to integrate the conceptually and emotionally demanding work of the whole process before moving onto another theme.

Eighth process: Accompanying – supporting changed practices

In this process, we turn to consolidation and closure. This element of the intervention is characterised by earth. It is that part of the intervention that actively supports the intended change coming into tangible being. It is the taking up of the space that the intervention, up to this point, has been creating. This element involves making things physical, visible or tangible. It is the element of matter. In organisation development work, it is at this point that structure, or restructuring, is put in place. It is also the point at which the skills necessary for putting the changes into place are identified, and those skills are sought.

It is worth noting that, in this approach to development practice, skills acquisition and organisational structure are features of the final phase of intervention. They are relatively simple outcomes of highly complex and demanding work. However, these two elements are often standard features of capacity building or development work as it is currently undertaken – usually in the form of establishing community-based committees or stakeholder groups, and then training them. Alongside the researcher, the trainer is another powerful specialist in development work, and resources are made available around this small aspect of the development intervention because it is quantifiable, predictable and neat.

In the approach used in this workbook, while skills and structure may be outcomes of the development intervention process,

they are not the essence of the process itself. The generic development practitioner needs an understanding of this phase, an ability to work in it, and must have a grasp of the processes at work. Many development practitioners undertake training as part of their core practice, and this can be very helpful if it fits suitably into the *client's* process. However, there is a lot more to this phase than training and setting up structures. Our work has shown us that resistance to change kicks in, in earnest, at this point of the process. We may understand what needs to move on; we may even have decided to do things differently in the future. However, sliding back into old ways is so very easy. More than training, accompanying and supporting change involves helping clients to really establish changed practices. More than structuring, it involves helping clients establish processes that work in support of the new way.

Where the element of earth enters a developmental relationship, the role of the practitioner shifts. Instead of holding and guiding the process here, he or she now *accompanies* the client. The task is to be present, but not intrusive; to accompany, not to own. Very often, things take on a life of their own in this phase. Plans are not necessarily implemented as they were intended, but other things may be hap-pening. For the practitioner, in collaboration with the client, it is important at this point in the relationship to be aware of the shifts taking place. It may be that it is time to move on, for the relationship to come to an end. At the very least, it is time for things to change and for both prac-titioner and client to let go of how things have been.

Working into change

This exercise is an opportunity to reflect on change, and the obstacles – both internal and external – that we place in its way.

First, find an example in your life in which you, in some form of relationship with others, were a part of making some changes. This might have been in a work situation – perhaps a resolution to change your working habits, for example, shifting the way in which meetings are conducted, or even just where and when they take place. It could be a personal situation, perhaps a family decision to solve problems in a new way or even, quite simply, to change a meal-time, or allocate chores differently.

It does not matter, for the purposes of this exercise, whether the intended change was accomplished or not. What matters is that you were directly involved in working at it, and that it was done socially, in relationship with others.

Map the whole process over time:

How were things before the change?

How did the change come about, what was happening that told you that something new was needed?

What would you say was emerging in the situation (that indicated a change was needed), what was it becoming, that required a change in the way things were done?

What kinds of decisions and resolutions did you make towards supporting the new situation?

Were these implemented and, if so, in what ways?

What was the end result?

When you have finished your overview of what happened, look at it all and consider:

What inside you helped and what hindered the process of implementation?

What helped and what hindered the process in the behaviours of others who were a part of the change project?

What helped and what hindered in the environment around you all?

Then, look at this situation again from the point of view of a facilitator of change processes. If you were a facilitator of that particular change process, what would you have had to bring into the situation in order to enable the change to emerge and take hold?

Share these thoughts with your speaking partner and, when you have both had a chance to share, look together at your understanding of development and development intervention. Does this change or add to your ideas?

Using this exercise with others

This exercise follows a simple reflective form, found in many others in this workbook. The special focus of this kind of exercise is to practise observation of social phenomena (even those of which we are, or have been, a part) with some distance, in order to *see* it in its full complexity. Because such 'seeing' involves observation of a living process, the exercise is also exercising one's ability to apprehend movement, growth and change. As with all of these exercises, they follow a straightforward formulation. They are devised with a clear purpose in mind – to practise seeing, through reflection – tasks are given with a clear sequence and there is opportunity at the end to apply whatever has been learnt to current practice. When using this exercise, or a variation of it, with others, these simple principles should be kept in mind.

Exercise: Changing relationship

The developmental relationship has features brought by the individuals involved and some contextual features, depending

on the material and political circumstances of any particular relationship (think back to the work you did on meeting – the developmental relationship in the fifth process on page 35). Whatever is brought , and however it is brought, the deve-lopmental relationship is constantly evolving, too. As the intervention proceeds, so some of the needs of the client become resolved and others emerge. This has implications for the work of the practitioner and the understanding between client and practitioner.

To begin with, think of your own life. Can you identify a time when things were changing more inside you than they were in the relationships of which you were a part? For example, these could be changes in you as an adolescent and the impact that might have had on your relationship with your parents or changes in relation to friends during studies. It could also involve changes in relation to a partner after the birth of a child or changes in relation to your employer as you met more and more of the developmental challenges in your job. Think over what happened.

How did the changes affect your relationship?
What happened?
How did you deal with these changes and what was the end result in your relationship?

Make a note of these thoughts. Then read the following extracts which are from a CDRA annual report on the theme of capacity building.[40] Read through these two extracts before working through the questions that follow:

Suporting changed practices

Differentiated interventions

The community in which no organisation or in which only quasi-organisation exists requires leadership and motivation, a galvanising activity. Pure facilitative fieldwork may not be appropriate where there is no groundswell of activity to facilitate. Rather, the fieldworker needs to work here more as 'animator', even possibly as activist, in order to provide the leadership which is lacking, to provide 'voice' in the midst of what Paulo Freire called the oppressed's 'culture of silence'.[41] Yet later, when organisation is established and has attained a certain degree of capacity, this same attitude will come across as paternalistic and patronising, and will in fact often hold the CBO [community-based organisation] back from further development. In other words, fieldworkers and NGOs [non-governmental organisations] who have worked as animators often develop the idea that the developing CBO somehow 'belongs' to them. The attitude which helped build capacity at one stage becomes detrimental at another.

Even later, when the client organisation is more sophisticated, the unstructured, informal nature of 'community development' fieldwork which works so well during

the organisation building phase may become detrimental when it no longer accords with the growing formality and differentiation of the organisation. Fieldworkers value informality while organisational consultants prefer to work within the framework of formal contracts. While informality facilitates interaction with less sophisticated organisations, it often keeps control of the process in the hands of the fieldworker. Part of the organisation's development of capacity lies in its ability to take control of the interventions which it requests; setting the terms of reference and defining the framework. This is the domain of 'consultancy fieldwork' rather that 'community development fieldwork'.

Capacity building

All too often relationships between capacity builders and their client organisations come to an end or decline at the point at which they should be changing. This happens because they cannot find the way of shifting their relationship or the strategies which inform the relationship.

Thus (Northern) donors find it difficult to be challenged by their recently capacitated Southern 'partners', even though this should be regarded as success in the capacity building game. Similarly, NGOs preach accountability but find it difficult when they are actually held to account by CBOs. At the same time, our research [on which the conclusions of this report was based] revealed that, within communities, the CBO which begins to operate as a dynamic capacitated organisation often loses touch with its own membership.

Initial relationships are often undeniably ones of dependence and, by their very nature, somewhat patronising. Initially, this is not necessarily a problem. It is often out of this dependency that capacity building begins. But the objective is independence, ultimately even interdependence, and it is often the practitioner who fails to make the change. This may be due to the capacity builder's own insecurities, to limitations in strategic versatility or even to the (unconscious) development of co-dependency. Whatever the cause, it is at these times that the practitioner becomes the greatest stumbling block to the client's development. There is abundant evidence that programmes and assumptions are thrust upon recipient organisations in spite of, rather than as a response to, their real needs.

Think now about your work with clients and identify one example of where the relationship between you and client changed significantly, largely through the client's initiative.

What happened in the relationship that told you that things were changing?
How did you respond?
How did you and the client deal with the situation?
In what ways were things different afterwards?
Did you reach new agreements (either a formal contract or an informal understanding)?
What were the consequences of this change for your broader work commitments and other relationships?

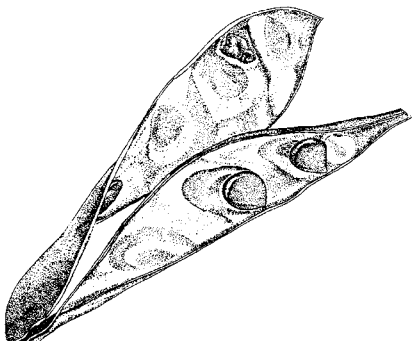
Note the key elements of this story, then share it with your speaking partner. The role of the speaking partner is to examine the role that you played throughout the changing relationship, particularly with a view to highlighting issues of power – how you dealt with changes in the dynamic, and discipline – the ways in which you continued to deal with the changes as a part of the developmental process. Your speaking partner could offer a characterisation of the way in which you dealt with change and the consequences that it had for your own working relationships.

At the end of the conversation, identify the general lessons that emerge for your ongoing practice and make a note of these. Have a look, in particular, back at your formulation of the developmental intervention and see if you have any changes to make to your sense of the role of the practitioner towards the end of the intervention.

Using this exercise with others

Here, in addition to the introduction of an outside perspective on this topic, 'pointed' questions (focusing on power and discipline) help bring focus to the discussion. Using an in-depth case study to illuminate themes is a good way of helping people connect with the particular point being made. (In this case, the changing developmental relationship, itself an outcome of a previous intervention, can be extremely challenging for the practitioner.) For more ideas on using case studies, see the ninth process in the next section.

Centring



Along with approaching and intervening, centring[42] is the third element of developmental practice. Centring concerns itself with one's practices towards consciousness, self-awareness, learning and self-management. It is not the principles, theories and beliefs underpinning developmental practice. And it is not the direct, client-focused aspect of practice. Yet this third element contains all that makes this approach to practice truly worthwhile.

Through active and continuous learning, we keep developmental practice alive and relevant to the realities it encounters and keep ourselves fully involved as vital and evolving parts of the systems into which we intervene. Through conscious and careful self-management, the practice remains rooted in what is practically possible and defensible from a discipline point of view. Through continuously centring ourselves within our practice through reflection, we hold ourselves open, alive, and alert to new possibilities.

Through consciously working at centring practice, we cultivate stillness, focus, depth and self-possession in the way in which we undertake the work. This is the real work involved in building oneself as a tool for this work – it is continuous and involves constant attention to all aspects of self. We cannot seriously intervene into the development of others if we are not paying equally full attention to our own ongoing, ever-changing, processes of development.

What this demands is a willingness to see oneself, dispassionately, and to work continuously at reaching such insight, and resolving to act on whatever aspects of self the insights yield. This commitment to developing continuous self-awareness and

improvement – not only of your person but also of your practice as it manifests in the world – must happen from a point of view that is based on self respect and acceptance. Working with this paradox – that good developmental practice involves both self-improvement and self-acceptance – is the central task of centring.

Ninth process: Learning from practice; learning about practice

In this process, we address what it takes to establish an approach to learning. Where space has been made to learn, to reflect, to make sense of and to work on future prac-tices, then one's practice is alive. This requires a very particular approach to learning, one that is well provided for in the action learning approach. This approach is based on experience, not ideal theory, and aims to help create concepts and resolve so that practice emerges out of a lived reality.

Action learning is the basis of an approach that can be used at all levels – working with self, colleagues, clients, individuals, groups and organisations. It has provided the basic methodological framework for many of the exercises in this workbook and offers a 'process guide' for working with a range of issues in the field.

Here, we explore some of the thinking behind the action learning method. We do this through exploring the concepts behind action learning and introduce some of the core action learning practices that are concerned with learning about and from practice.

One of the premises underpinning this process is that while you can only learn for yourself (you cannot learn on behalf of anyone else), there is such a thing as learning as a social activity. Seen in this way, learning is something that can happen in relationship – not just because it makes it more interesting for the individuals concerned – but also because learning is a social activity, it actually creates something between the people doing it. It is at this point that learning comes into its own. It can be between two people, with speaking partners as is the basis for this workbook, and also in teams and organisations.

Socialised learning creates practice not just in individuals, but in teams and amongst like-minded individuals, whether they know each other or not. It is at that point that what we do and strive for as individuals becomes larger than any of us. It is precisely this learning that creates the basis for what we term a discipline and a profession.

Learning about learning

This exercise is an introduction to thinking about learning and offers the action learning approach as one way of seeing the learning process.[43]

First, spend some time thinking about a period, in adulthood, when you really learnt something. This period of learning should have a discrete beginning, middle and end, in the sense that you began not knowing, then went through a period of learning, then emerged out of it 'knowing'. It might be a tangible skill that you learnt, like driving, or drawing, or it might be something more connected to insight or understanding. Think over the whole experience and make a note of the significant steps that were involved in your process of learning. In other words, identify what you went through, internally, in order to get to the point of 'knowing'. Out of this exercise, can you begin to see how learning happens?

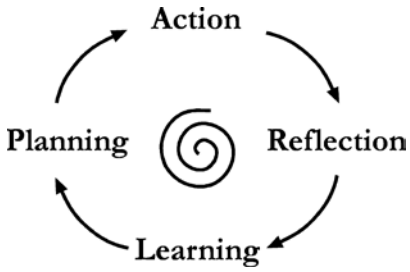
Get together with your speaking partner and share what both of you have come to. Using both of your reflections:

Can you begin to map out the steps by which learning tends to happen?

When you have done this, read over the following description of action learning drawn from the book *Action learning for development: Use your experience to improve your effectiveness*.

The action learning cycle

As children, we quickly learn to avoid touching a hot stove because it burns. As adults, we continue to learn from experience. The action learning model[44] simplifies the process of learning from experience into four orderly steps: *action* (doing), *reflection* (looking back on what you have done), *learning*, and *planning* (planning future action in the light of what you have learnt). These elements may be thought of as a repeating cycle of activity.



The key principles of *action* are:

- understanding develops naturally from experience of actions and does not necessarily need to involve formal teaching or academic models
- people know their own experience of their actions
- actions, feelings and people's understanding as well as the 'objective, real facts' are all essential knowledge
- learning often involves changing values, thoughts and behaviour
- action means risk because failure may occur.

The key principles of *reflection* are:

- asking deep and searching questions helps reflection and evaluation
- conscious reflection and evaluation are best achieved in discussion with others
- reflection tests what you see, understand and assume about reality with how others see the same reality
- the reflection process tries to look at the whole range of factors that might contribute to an event taking place and not just one simple cause.

The key principles of *learning* are:

- generalised learning does not automatically result from reflection
- the purpose of learning is to improve future action
- the only way to measure whether or not learning has taken place is to examine the quality of future action.

The key principles of *planning* are:

- planning is the link between past learning and future action
- planning is thinking about the future and deciding how to move towards it
- the future is unknown so planning is seldom perfectly accurate
- plans that result in 'failure' are as valuable to learning as those that succeed
- regular evaluation must be built into all plans.

The ideal action learning cycle is an *upward spiral* of learning and increasingly effective action. When each cycle of learning builds on the previous one to improve the effectiveness of future action, then the full power of action learning is realised. It is possible for the cycle to go round and round in circles *at the same level*. Here, people learn from what they have done, but do not manage to do things differently, so things do not get better. When people do not learn from their actions, their future action becomes less and less effective, and the spiral *goes downwards*.

How does this description compare to the framework you devised?
Are there similarities?
What are the differences?

Having looked at this description of the action learning cycle, and keeping in mind your own thinking around learning:

What does the process of learning tell us about how it might be pursued in ourselves?
What are the kinds of processes and activities we (development practitioners) need in order to learn from practice?

Using this exercise with others

This exercise is an example of how action learning can be used to introduce a topic. This tool has been used in elsewhere in this workbook, including the 'reflecting on development' exercise (page 16) and 'thinking about facilitation' (page 56). It is also used here as an introduction to a series of practices that can work in support of learning. For this reason, the last task – identifying the kinds of processes we need in order to learn from practice – is a significant one. In a facilitated process, this task should be given enough space and time to be well explored.

Learning practices

The remainder of this process is not so much a series of exercises as guidelines for practices that can (and ideally, should) be pursued over and over again. All of these practices aim to bring practice into reflective and conscious light. These practices constitute the core of a learning approach. They are, strictly speaking, not exercises, because there is no gap between doing what is suggested here and applying it elsewhere. The achievement lies in the very doing.

There have been hints at this approach throughout the workbook (for example, the exercise 'reflecting on a current relationship' (page 42), in the case stories that you are asked to present from time to time, and in 'double characterisation' (page 52). Here these practices are introduced in full.

Reflecting on relationship

Here is an opportunity to pause in whatever developmental relationships you may be a part of, and reflect on how they are going. For the purposes of this workbook, it makes sense to return to your speaking partner relationship and reflect on it again.

To start, make a time to meet with your partner and ensure that you will be undisturbed for an hour or two. The purpose of the meeting is to reflect on your relationship and to identify learning

and also changes that could be made. It is evaluative in the best sense of the word – it has to do with *identifying value*.

As preparation for the meeting, you should both spend some time thinking over the relationship and identifying, first, what the primary function, or task, of the relationship has been (this establishes your overarching terms of reference for the reflection). When you have done that, try to map the path of the relationship:

How did it start, what happened?

What were the significant moments in the relationship?

What has gone well, and what has not gone so well?

Keep in mind that this is a reflection on the relationship – not your speaking partner – so you can, and should, include yourself in the reflection.

When you meet up, ensure that you each have enough time to talk and that the time is divided equally. Each person has an opportunity to present his or her whole picture of the relationship. The speaking partner's task is to listen carefully and to become as aware as possible of the realities and concerns that the other is bringing up. At the end, the partner should try to keep his or her questions at the level of questions for clarity. At this stage, the partner should not engage with any of the issues raised in the presentation. When the first presen-tation is complete, swap roles and follow the same process with the second speaker. Once both have spoken and had opportunity to clarify their presentations, begin to engage with them. Compare differences and similarities, and share with each other your responses to and feelings about the presentations.

When you are satisfied that you have completed the task, take some time to reflect on all that you have heard and said and thought. Try to come to a characterisation of the relationship. Share these with each other. In conclusion, draw out the features of a developmental speaking partner re-lationship that you could use as guidelines for future work and relationships.

Reflective reports

This is a very simple practice which, when done regularly, yields very good returns to practice and self-understanding.[45] If it is done in a team, it will help to build relationships in the team.

The reflective report is a short account of your reflections on and learning from practice over the last while. Anything between a month and six months is a good time. If you focus on a longer or shorter time it is difficult to reflect on what you have done and learnt. The report is written in the first person and is informal and conversational in tone. It is also short – no longer than about 800 words and generally less than that, so it stretches your ability

to describe the *essence* of your practice. It might involve a full review of practice, in which you look back over all that you have done in the given time, or an exploration of practice in relation to a particular theme or issue that has arisen in the time under review.

To begin, decide with your speaking partner on a time to meet in which you will present reflective reports to each other. Decide also what period they will cover and whether they will be general practice reviews, or focused on a theme. Write your reflective report.

When you meet, decide who will start, and allow about ten minutes for the person performing the speaking partner role to read the report. The speaking partner should read with an eye for the essence of the practice that is emerging in order to be able to characterise the practice. The writer of the report starts by giving an introduction or background to the report, if he or she wants to. The speaking partner then characterises it, following the process of characterisation described on page 12. It is important that some of the speaking partner's own responses be shared, as well as their characterisation of the practice of the other. That way the report writer hears both the personal, subjective responses to his or her practice, as well as a more considered picture, both of which can be helpful. The round ends with the writer closing and saying what he or she has taken from the session.

When you have both had a turn to share and characterise your reports, you could look at what has emerged from both reports.

From the reports, can a developmental practice be seen that is common to both?

Can you characterise the practice that lives between you?

This practice really has a beneficial impact if done regularly. Try to establish a regular meeting with your speaking partner where you will meet and share reflective reports.

Presenting a case study

This is another way of working with practice – this time not generating a broad overview, but rather presenting an in-depth case study and using the learning from that as a basis for deepening and improving practice.

To begin, decide on a case – a particular intervention that you would like to explore – and think over how you would like to present it.

When you have identified your case and the kind of presentation you will make, spend some time preparing it. Generally, the better you have prepared, the more helpful the case study process is to you and others. The toughest challenge in any case presentation is to find the right balance between enough information to make it meaningful without overwhelming the listeners with detail. It helps also to have a clear time-boundary for case studies so that the discussion does not go on too long.

Methods of presenting case studies

Helping the presenter to solve a problem. This is the simplest way of conducting case studies and is usually applied when a case is in progress. This involves the presenter making a succinct presentation of the situation, ideally ending with a question or statement of the problem. Respondents then ask questions for clarity (but these must be kept brief), and this is followed by a discussion towards offering help and advice with the questions.

Helping the presenter learn from a case that has ended. This kind of case study is drawn from a case that has been completed, an intervention that has run its course. As with the presentation above, this involves a presentation of the key details, outcomes and questions emerging, followed by questions, discussion and feedback to the presenter. Discussion and feedback should focus here on general principles for practice as it is not that helpful for the presenter to be advised on what they *should* have done in an intervention that is over.

Focusing on learning for a group. In this method, the presenter is also an active facilitator of the whole group's process (unlike the previous two where they receive feedback and ideas). The presentation involves a concise picture of the situation, followed by questions that are aimed at challenging members of the group to extend their own thinking and understanding. The point in these discussions is to draw out 'in-principle' lessons for development practice that can be applied by all participants. This method is likely to be used in a training setup, and may or may not involve the presenter's own practice. It is designed in such a way that participants are stimulated, through the case, to reflect on their *own* practice and/or that of their organisation. Questions accompanying this kind of case presentation should help practitioners make links to their own experience and seek patterns across experiences. This approach to case studies can be concluded with general lessons for practice, or even with formulating something more specific, for example a model or framework for future reference.

Decision case.[46] This is run as a learning opportunity for participants, and is not necessarily based on a sharing of practice. Cases could be drawn from a textbook or from a compilation of case studies drawn from practice.[47] This approach involves a succinct presentation of the case situation with the story stopping at a point where a critical decision had to be made. Participants are asked to tackle the case as if they were the practitioner in the situation, and to propose solutions or make the crucial decisions needed to take the process forward. These decisions and the thinking behind them are shared and, in a group situation, debated and discussed. The facilitator then moves the discussion away from the specific situation to asking participants about

the lessons and learning that may be drawn from the case which are more generally applicable. At the end, the actual outcome of the case may be shared. It is important that this outcome is not presented as 'the answer'. Indeed, it is often cases which did not turn out well which generate the best learning. A decision case study can also be used with a speaking partner.

If the practitioner who undertook the original intervention is also the presenter, this process can also be very valuable to his or her own reflective learning. It is, however, quite risky and a practitioner in such a situation should be careful to only present decision cases that he or she feels fully resolved about. This is because the ideas and suggestions that emerge from a discussion like this may be very challenging for a practitioner presenting the case. The presenter in such a situation may feel defensive about the outcome, and may take comments personally.

Present a clear picture of the situation to your speaking partner. It often helps to have diagrams and summary sketches ready. It can also help to present something from the client – a brochure, a report or photographs – as this helps give direct insight into the situation. Ensure that your presentation ends with some questions that are your own, questions that you are living with. Case studies run towards building one's practice are not about developing remote analyses of a situation 'out there'. They are primarily about you, your practice and its value. For this reason, your questions should ultimately be focused on you and your role in the situation.

Your speaking partner will have questions for clarity, and these tend to lead to broader case discussions. This can be extremely helpful as long as an open-ended discussion is brought to a close and some focused points are captured at the end. At this point, it can help if both you and your speaking partner each spend some time alone thinking through the case and the questions you have brought to it. Then discuss your responses to the questions. The case presentation ends with you noting what you took from the discussion and identifying future practical steps, if appropriate.

Establishing my own toolkit

This is a very helpful practice, involving an empty file, blank paper and an A–Z index system. Use this file for all the ideas, tools

and exercises and anything else you might have found helpful in the course of your practice, including quotes, poems and references to books. Initially, this toolkit may seem thin, but if it is maintained, almost as a practical journal, it will soon become an invaluable resource of things that are of use and value to you in the course of your work. Two qualifications apply to this practice: First, some people feel that the contents should all be hand-written because 'there is nothing like writing things out by hand to get them into your system'.[48] Second, while we may accumulate many, many ideas and exercises, it is likely that any single person will only end up using a few that work well.[49] It is better to be fully comfortable and adept at using these few than to be constantly seeking many, and attaining mastery of none.

Introducing these practices to others

All of these practices can be introduced to others, even in a group process. If this process involves training, it is harder to ensure that the practices are taken on by the trainees, but it is certainly worth introducing them. They are best taken on board by a whole group working in some kind of organisational or collective setting since this provides opportunities to practise them regularly.

The practice of having a speaking partner, as well as reflective reports and case studies, are all ways of ensuring transparency of practice amongst peers, and therefore function as a peer accountability system. Because they are also egalitarian and everybody engages in these practices, they also play a meaningful team-building role and create the space in which a group-wide discipline, or practice, can be built.

The reflection on relationship, and the ongoing speaking partner relationship, can only be instituted where there are high levels of trust amongst participants. While such relationships may be organised and mediated through a group process, people cannot be forced into these relationships.

Both the reflective report and case study processes can be run in larger groups and lead to great benefit when done with a learning community of peers or colleagues over time. Presenters benefit from wider and more diverse input when these practices are done in a larger group than when they are done only with a speaking partner. However, in larger groups, the process needs to be firmly and carefully held, particularly at the start. In its early stages, it is easy for a tone of blame, bullying or competitive behaviour to creep in when groups are not accustomed to a more supportive style. If this has happened, it is very hard to open the space and trust again. Once the practice has 'taken', it is easier to let go, as the group becomes

self-regulating and is better able to hold itself on course in terms of its consciously preferred values. As trust grows, this makes space for a more robust and direct tone to develop.

Establishing one's own toolkit can be run in a group process. This helps motivate participants to organise their own material and to integrate whatever they are learning, at the time they learn it.

Tenth process: Ending with self

This last process brings the whole approach of this workbook full circle – that we can only do with others what we are able to do with ourselves. Put another way – our practice is only as good as our abilities to *live* the fundamental ideals underpinning this approach. We can, and must, improve our abilities to work with the different elements, to gain as much knowledge as possible, and to learn and to manage ourselves effectively.

But there is another dimension – that of continuous self-development – our own development not simply as practitioners, but as human beings. Development practice tends to get stuck between the polarities of self-indulgence (where practitioners are so involved in intro-spection that they cease to see the broader context) and selflessness (where the self is negated to a point of total effacement – and, with that, risking undoing the very good that the intervention aspires to do). However, it is not simply about continually trying to find a balance between these competing tendencies. Rather, we seek a third quality out of the interplay of these two – that of clear self-awareness in relation to the other; being simultaneously aware of both the inner and the outer worlds. Building a disciplined approach is about conscious learning about and from practice, and also about cultivating inner discipline and self-awareness.

This is a continuous, life-long journey. It demands awareness not just in the realm of work, but your whole life. While lifestyle-related practices are not in the ambit of this workbook, it bears em-phasising here that these can help sustain a reflective and responsible approach to work and human relationships. From the tangible tasks of appropriate exercise, proper eating and finding the space to pursue your own special projects to the more elusive challenges of cultivating stillness and depth on a daily basis, the value of pursuing these accrues not only to yourself, family and friendships, but also to work in the field.

Returning to self

This exercise returns to the start of this workbook and the first process – *Starting with self* – emphasising self-awareness.

Spend some time (a few hours, even) reviewing the work that you have done in the course of this workbook. Begin with the question that you originally formulated. Look over the work you did on a vision for practice and changes that you made to your question along the way. Look also at your thinking about development, the development intervention and facilitation. As you do this, review more broadly, thinking about your practice, how it has developed and changed in the time that you have been working with the workbook.

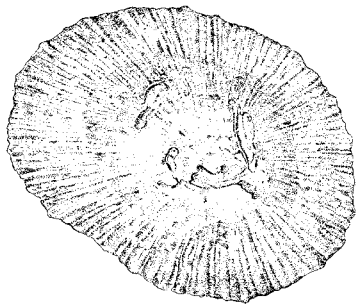
1. Are there any moments that stand out in this time, events or situations that you think sum up, or best illustrate, the development of your practice? Identify one and describe it to yourself in detail. When picturing this situation, try to observe yourself, as an outsider would. What do you see in the whole situation, including the role that you played?
   Out of this, how do you describe your approach to guiding social process?
2. Returning to your question about guiding social process, and based on this review, what changes do you make to it?
3. Finally, and looking at where you have come to, what does this approach ask of you in your daily life and practice, both personally and professionally, and what steps will you take to fulfil this?

Then get together with your speaking partner and share, using the following process:

1. One person presents. Begin by sharing your question and how you feel in relation to it. Then, as clearly as possible, tell the story behind your question (including what you observe of yourself as an outsider) and complete your presentation by restating the question.
2. The speaking partner shares his or her characterisation of the presenter's current practice and question.
3. The presenter sums up what has been heard and describes what he or she takes out of it, ending with a statement (or reformulation) of the question emerging out of completion of the workbook and sharing some of the practical steps that this will involve.

If, at this stage, you are also terminating your speaking partner relationship, you may wish to reflect on it and what you have learnt from it, perhaps returning to the exercise 'Reflecting on a current relationship' on page 42.

Closing



Using this workbook in facilitated processes

It is not likely that anyone would work through all of the processes and exercises in this workbook from start to finish, and in the order in which they appear, as was suggested at the beginning. While we have tried to organise it with some sense of the flow of a viable learning process, we have found that effective process design seldom corresponds with the logical flow of information. For this reason, the thematic connections in this workbook have prevailed over the process connections.

In this closing section, three kinds of designed processes are discussed, including a sharing of some of the design principles behind the processes and suggestions about how this material could be used in facilitated learning processes.

Monthly learning meetings

In this example, a group of development practitioners might choose to get together regularly (say, monthly) to share and learn from each other. The objective of these meetings would be to enhance individual practice through group learning, but also to build a collective practice that bears the distinctive character of that team.

Basic design principles

- Start with a clear initial plan that outlines what you hope to achieve in the first few meetings, including provision for review and re-planning. For example, you might

plan a programme that begins with a session on 'establishing the learning group and its aims', followed by one on 'thinking about development'. Later you might anticipate exploring aspects of practice in some depth, for example, sessions on 'relationship', 'facilitation' and so on. Once a few sessions have been run, you should plan for a review of how things are going. Once the review has happened, the plan can be changed, if need be.

- Aim for a balance between planned activities and open space in which current experience can be discussed. Within each meeting there should be time, then, to explore a topic, but also for participants to share some of their current experience.
- Ensure that the amount of time you give yourselves is realistic, given what you hope to achieve. If you have half a day a month, you may be able to complete one activity per meeting. This could be an exercise, a case study or a reflective report. If you have more time, you might be able to schedule more activities.
- Ensure that each meeting makes space for participants to connect with one another at the start of the meeting. In a short session, this might take the form of a brief round in which everyone has a space to share something of themselves. In a longer session, such reconnecting can be a meeting in its own right.
- Initially, learning groups demand strong and committed leadership. This is particularly important as the learning space needs to be held as it will always be at risk of other priorities encroaching on it. As the learning group develops, and as commitment to holding the space is increasingly shared, the group becomes more self-regulatory. Ensuring that there is space for regular assessment of the process itself ensures that the group is increasingly included in holding the process.

A residential workshop: Introduction to guiding social process

This kind of process might be spread over two weeks and involve one or two facilitators and between 12 and 18 participants. Its residential character is an important part of the learning process, as it allows for a deepening of relationships in the group, a focus and attentiveness and quite practically, gives more time for learning and integrating learning.

Basic design principles

- When starting your design, look at the whole period and sketch the broad

content aims and learning rhythms that you seek to achieve. Save detailed activity design and time allocation for later in the process, when you have a clear and living picture of the whole process in your mind's eye.

- Theoretical concepts can be tackled in a straight line, in a systematic way. Personal learning and development is not so linear – it should be structured into the process so that it is tackled in a rhythmic fashion (for example, reviews at the start of each day; creative and personal development work after lunch).
- Integrate reflective learning practices (for example case studies, reflective reports, meetings with speaking partners) into the structure of the process, rather than adding them all at the end.
- Check that you have a balance in your broad design – a balance between content ('input') and experiential process; a balance between group and individual work; a balance between conceptual work and social and emotional work; and a balance between activity and quiet time.
- Spending a good amount of time on helping the group form and helping people to get to know each other will pay off later in the process. There is no point in rushing ahead with an agenda when people are uncomfortable with one another.
- Make good time for morning review sessions – these are often where both the content is deepened as well as the trust in, and strength of, the process is established. This is particularly so for processes that use reflective learning extensively as this generates enormous learning about process as well as new insight into contextual and theoretical questions.
- Try to ensure that the after-lunch sessions are used doing creative and/or personal development work. Heavy-going plenary sessions and conceptual work will put people to sleep.
- Try to avoid 'rounds' of report backs from small groups. The point of this work is to stimulate and deepen individual consciousness, capacity and learning. It is not about reaching group agreement. Groups can just as well report back in an open plenary that invites individuals to share anything of particular interest with the group. Alternatively, reporting back can be done creatively using, for example, drawing, drama and poetry. These are far more stimulating for the listeners and also challenge those reporting to get to the heart of what they have to say.
- Avoid using the evening sessions for structured work. Rather leave them to be used for reading, writing reports and journals, preparation, work with speaking partners, films on relevant themes and social contact.

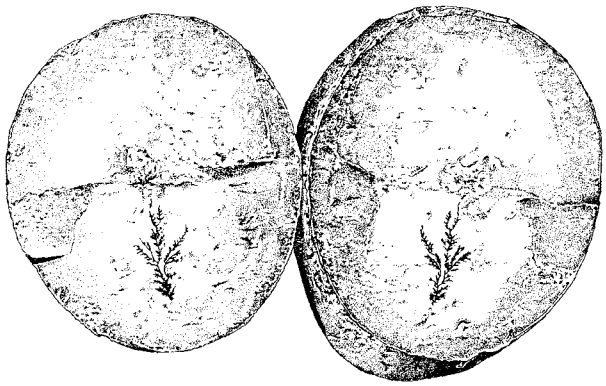
A two-year process for experienced development practitioners to enhance their abilities to guide social process

This kind of process is less a 'course' and more a process of accompanying participants on their journey of personal and professional development. Run over an extended period (like two years), this would involve periods of intense contact, for example, six week-long meeting sessions interspersed with longer periods (3–4 months) of work in the field. Such a process should ideally have two facilitators, and involve a group of 8–12 participants. While many of the group process design principles apply here too, there are other challenges and opportunities presented by such a process.

Basic design principles

- Keep in mind that while most design will happen in relation to the meeting sessions, this is a long-term process and should be conceptualised as such. Thus the spaces between meetings are as important as the meetings themselves. Participants can be expected to go through many changes in this time, and the process will affect, and be affected by, these changes. More practically, the spaces between are opportunities for research and writing work to be undertaken and it is through them that a thread is held through the whole process.
- Because this process incorporates extensive periods of ordinary work, it can combine learning from current practice with more structured processes of learning and review. Time must be made in the process to allow issues from the field to be dealt with at each session, as well as a more formal 'curriculum'.
- There is time and space in this process to deal with each participant's actual practice and its development over time and so a lot of time can be used on learning practices (for example, case studies and reflective reports) without compromising the attention that is paid to content and personal development.
- In addition to group process work, the meeting sessions can allow for working in pairs (as with speaking partners) as well as for periods alone.
- There is also time in this process to deal with themes in-depth and to include study of various points of view, not just the one promoted by this approach.

Endnotes



Acknowledgements

[1] An intensive practitioner formation programme taking small groups of people through two years of personal, practical and theoretical development. The pro-gramme was run in 1996 and 1999 and altogether 13 people passed through it. It is led by Allan Kaplan and co-facilitated by Sue Soal. It is due to run again from 2004.

[2] Action Learning, Education for Development – ALED – a programme that uses action learning methodology in learning about development. ALED was introduced to the CDRA by Dirk Marais and James Taylor. A variation of it persists in CDRA's current dialogue programme, and the action learning methodology continues to be used throughout our work.

Opening

[3] Our existing publications and materials address several needs. We often produce process notes out of organisational workshops and group processes, and these map the unique and individualised processes that emerge. In our courses we share structured exercises and readings with participants. Through our annual reports and books we share the lessons and insights we have gained through reflection on our own practice.

[4] There many extremely useful toolkits available. Examples include the now classic three-volume work by Anne Hope and Sally Timmel *Training for transformation: A handbook for community workers* (1984) which still offers an excellent and comprehensive guide for development practitioners in

the field. A fourth volume covering contemporary issues in development was added in 1999. In 2002 Lisa VeneKlasen and Valerie Miller's *A new weave of power, people and politics: The action guide for advocacy and citizen participation* was added to the literature. Solid references coming out of the corporate sector include Peter Senge's *The fifth discipline* (1990) and the accompanying *The fifth discipline fieldbook* (1994) as well as *The systems thinking playbook* by Linda Booth Sweeney and Dennis Meadows (1995).

[5] This was adapted from an exercise in Kees Locher and Jos van der Brug's *Workways* (Stroud, Gloucester: Hawthorn, 1997:16–9), and is used with permission.

[6] For more on characterisation see Kees Locher and Jos van der Brug's *Workways* (1997:44–7) and Allan Kaplan's *Development practitioners and social process* (2002:131–2).

Approaching

[7] For an elaboration of this view, see *Capacity building: Myth or reality?* (CDRA 1995) in which the notion of 'capacity' is explored. Our research behind this report – an evaluation of Oxfam-Canada's Capacity Building Programme – showed that a coherent conceptual understanding of the world and one's work in it was the single most powerful element of organi-sational and individual capacity.

[8] Thanks to Lynette Maart for introducing this concept. It proved to be most helpful when working with fieldworkers, avowedly sceptical of theory, yet inspired to see their own emerging 'theory-in-use' in the course of CDRA's Fieldworker Formation Course, run from 1994–98.

[9] This comes from the work of the NPI, and is a cornerstone exercise used in CDRA's training. We have found it remains as powerful and revealing today as it was when we first encountered it in 1986. It offers a unique way of connecting the world of theory, of concepts with one's concrete, lived experience. Helping people draw connections between their lives and the world of ideas through experiential exercises is a basic methodological approach used throughout CDRA's work and the 'turning points' exercise is a good and clear example of this. This exercise first appeared in print in Allan Kaplan's *Development practitioners and social process* (2002:138–9).

[10] This exercise was devised by Allan Kaplan and first used on the CDRA Fellowship Programme in 1999.

[11] This article appears in *Development practitioners and social process: Artists of the invisible* by Allan Kaplan (London: Pluto, 2002:xvii–xix), and is reproduced with permission.

[12] From the 1999 Fellowship Programme.

[13] A famous example of this is described by Viktor Frankl in his book *Man's search for meaning* (1962). During his experience of internment in a Nazi concentration

camp during the Second World War, Frankl realised that, even in situations where people have been deprived of their freedom, dehumanised, and all their familiar goals in life have been taken away, they retain the freedom to choose their attitude in a given set of circumstances.

[14] With thanks to Liesl Abrahams for drawing our attention to this way of viewing the distinction between 'development' and 'developmental'.

[15] See the note on key words on page 8.

[16] This is an adapted version of an exercise devised by Allan Kaplan and first run on the CDRA Fellowship Programme in 1999.

[17] Originally, these distinctions were made by Allan Kaplan during the 1996 CDRA Fellowship Programme. Subsequent work was done on this in the course of a 1999 evaluation of a linkage between Corat Africa (Christian Organizations Research and Advisory Trust of Africa), Intrac (International NGO Training and Research Centre) and Cordaid, in the 1999 CDRA Fellowship Programme, in CDRA's 1999/2000 annual report *The high road: Practice at the centre*, and in Allan's 2002 book *Development practitioners and social process*.

[18] With thanks to Dirk Marais for highlighting this.

Intervening

[19] This guiding question was introduced to CDRA by Mario van Boeschoten.

[20] With thanks to Marie Corcoran-Tindill for her emphasis on congruence as a key value in a developmental approach. See her 2002 thesis *Encouraging congruent practice in Irish development organisations: Turning the gaze back on ourselves and asking what's really going on*.

[21] See thoughts on the word 'client' on page 8.

[22] This is drawn from a psychodynamic approach to inter-personal work, using transference and counter-transference of feelings as a valuable source of insight and information into one's own behaviour. 'Transference' is the unconscious tendency of a person to assign to others in the present and immediate environment those feelings and attitudes originally linked with significant figures in the person's early life, for example, when a patient identifies his or her therapist with a parent and responds (positively or negatively) to that identification. 'Countertransference' is the unconscious emotional response of a therapist to a patient; determined by the therapist's inner needs rather than by those of the patient. (Definitions from Harold Kaplan and Benjamin Sadock's *Comprehensive glossary of psychiatry and psychology* (1991), Baltimore: Williams and Wilkins.)

[23] With thanks to Liesl Abrahams for this perspective on 'truth' in process work.

[24] Like the characterisation process and the 'turning point's exercise, these exercises have been used by CDRA since its inception and

remain a cornerstone of our conceptual framework and our practical approach to all the work we do. Originally sourced from the NPI, these exercises have been adapted in various ways throughout our work.

[25] A version of this exercise first appeared in print in Allan Kaplan's *Development practitioners and social process* (2002:145–6.)

[26] This view of listening and the accompanying exercise was originally devised by the NPI. This version of the model is adapted from one written by Doug Reeler of CDRA and was published as a 'nugget' on the CDRA website www.cdra.org.za in 2003.

[27] These exercises are also central to our approach and originate from the work of the NPI.

[28] With thanks to David Scott for introducing us to this exercise

[29] This was distilled from an exercise devised by Sue Davidoff which was then adapted on the CDRA Fellowship Programme.

[30] There is a very extensive literature on this subject. A few of the texts are Arnold Mindell's *Sitting in the fire* (1995), WR Bion's *Experiences in groups and other papers* (1961), John Heider's *The Tao of leadership* (1986), Bridget Pitt and Murray Michell's *Making workshops work* (1992) and the ten-volume *Handbook of structured experiences for human relations training*, edited by J William Pfeiffer and John Jones (1969–1994).

[31] Adapted, with thanks, from Sue Davidoff's unpublished paper *The art of facilitation*.

[32] This box contains a summary by Stephen Heyns of the facilitation skills chapter of *Training strategies from start to finish* by Paul G Friedman and Elaine A Yarbrough (Englewood Cliffs, New Jersey: Prentice-Hall, 1985), and is used with permission.

[33] This is a powerful point made by Marvin Weisbord and Sandra Janoff in their training programme *Facilitating the whole system in the room*.

[34] Many organisational development (OD) processes tend to pursue culture change, and the 'U-procedure' is one example of the path a culture change process tends to take. This maps the process of change from growing understanding of a situation, through to facing, and acceptance of the reality, a letting go accompanied by a commitment to change, and then, a taking on of the new. Strategic planning has a logic and flow all of its own, based on strategic thinking which is objective-oriented. Here detailed tasks and activities cascade out of broader aims and objectives. Some group processes are convened with the specific purpose of resolving problems, and these follow a typical problem-solving or conflict resolution path. Self-evaluation, another kind of process, tends to follow the action learning form – from reflecting on experience to learning from that experience, to re-planning towards changed future action.

[35] These exercises were linked to the objective of developing facilitator abilities by Allan Kaplan and first used in the 1999 CDRA Fellowship Programme.

[36] This is based on an exercise in Kees Locher and Jos van der Brug's *Workways* (Stroud, Gloucester: Hawthorn Press, 1997:111–2) and is used with permission. It was first introduced to CDRA by Mario van Boeschoten and is used in the CDRA Fellowship Programme.

[37] This is based on an exercise in Kees Locher and Jos van der Brug's *Workways* (Stroud, Gloucester: Hawthorn Press, 1997:151–2) and is used with permission. It was first introduced to CDRA by Mario van Boeschoten and is used in the CDRA Fellowship Programme.

[38] Exercise from Mario van Boeschoten/ NPI, and adapted by Allan Kaplan. For more on the concept of the shadow, read Allan's *Development practitioners and social process* (2002:85–92) and Robert Johnson's *Owning your own shadow* (1991). This exercise first appeared in print in *Development practitioners and social process* (2002:92).

[39] This exercise was developed by Allan Kaplan and is used in the CDRA Fellowship Programme. It first appeared in print in Allan's book *Development practitioners and social process* (2002:83)

[40] CDRA Annual report 1994/95: *Capacity building: Myth or reality?*

[41] In *Pedagogy of the oppressed* (1970).

Centring

[42] This section addresses itself only to the learning practices needed to sustain this approach. For more work on centring, see Allan Kaplan's *Development practitioners and social process.*

[43] This was first used on CDRA's Facilitating Organisation Development (FOD) course.

[44] Adapted by Stephen Heyns from James Taylor, Dirk Marais and Allan Kaplan's *Action learning for development: Use your experience to improve your effectiveness* (Juta/ CDRA, 1997)

[45] This is used by CDRA as a central learning tool.

[46] The central approach used in the ALED process – Action Learning: Education for Development – pioneered internationally in development by the Kellogg Foundation and in southern Africa by Dirk Marais and James Taylor, through CDRA.

[47] For example, *Community participation & financial sustainability*, compiled and edited by James Taylor, Dirk Marais and Stephen Heyns.

[48] With thanks to Allan Kaplan for emphasising this point.

[49] This was a comforting thought, stressed by Hamo Hammond, one of CDRA's founders.

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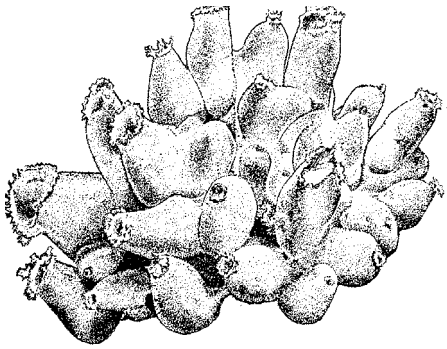

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CDRA has worked since 1987 as colleague, consultant, trainer and client with hundreds of development practitioners. This workbook is a response to the many requests we have received over the years for a 'toolkit' to make our exercises and methods transparent. This is not a 'how to' manual because our approach relies less on exercises, and more on each practitioner's professional insight, judgement and ability to intervene in the moment. This workbook outlines a developmental process for the reader to undertake with a speaking partner. It is based on the principle that you cannot do with others what you have not been through yourself. Users of this workbook will find that going through this journey will put them in a good position to adapt those exercises and methods which work for them and include them in their own development practice.

Sue Soal has been a development practitioner with the CDRA since 1994. She is particularly interested in organisational learning processes and their connection to both field practice as well as the evaluation of field practice.