



Tom Romito

FACILITATOR

TOM ROMITO'S FACILITATION LEXICON

This is a lexicon of my practice as a facilitator. It is a dictionary of terms I use in my practice. This content is based on my reading of great thinkers in this area, as well as my experience in the School of Hard Knocks. I write in my own style, which is homespun and as practical as possible. White papers and videos on my website and other social media describe these terms in greater detail.

- Open space technology. Pioneered by Owen Harrison, this is a technique to get a large group of people to work in smaller groups and analyze parts of an issue. They come back together and contribute their findings to form strategies to address the issue. Open Space Technology works well in other parts of my practice, such as Team Building and Strategic Planning.
- Systems thinking. Peter Senge is the Father of Systems Thinking. There's not much I can say about it that he didn't say in "The Fifth Discipline." However, I know that it's a way of looking at how forces in nature or in an organization interact to create a problem. I've come to the conclusion that the solution to the problem also lies in the way those same forces interact. I've successfully employed this idea several times in my core practice of strategic planning when I've worked with organizations to help them grow.
- Managing to outcomes. Mario Marino enunciated this idea in a great book called "Leap of Reason." It means that by applying a logic model, organizations that are struggling to achieve their goals can move beyond objectives and

activities by measuring the good they do for those they serve. That way, they could improve their programs.

- Surveys. Surveying people is a good way of finding out what they think about an issue. The computer age has given us automated tools to do this. However, I have found that nothing beats meeting with people face to face and asking them to fill out a carefully-constructed survey. That way I can coach them, encourage them, and get them to do it. This especially works well with a large group of people. I can walk away in 20 minutes with their completed surveys in my hand.

- Team building. Most organizations I come in contact with say that what they want to do, more than anything else, is become a team. If they get anything done, it's because someone has made something happen. They don't anything deliberately because they don't know how to work together. I help them learn how.

- Collaboratives. These are large groups of small organizations or agencies that come together because they share a common purpose and want to get something done. They need focus, and I help them gain it through my core practices of team building, action planning, and strategic planning.

- Action planning. One of my three core practices, I honed this skill mostly through the School of Hard Knocks. I get a group to focus quickly on what they're passionate about, build an agenda, and move right into action planning. They leave a workshop with a plan in hand and fired up to accomplish it.

- Strategic planning. My "flagship" core practice. Thanks to the work of Michael Allison and Jude Kaye ("Strategic Planning for Non-profit Organizations"), I have honed a ten-step process into an art form to help organizations bear down on their goals and figure out how to achieve them. This is the most abstract of my three core practices (team building, action planning, and strategic planning). It is difficult for most organizations to understand how

the process works and it takes considerable time to take them through it. But the rewards are great and long-lasting for an organization that makes the investment.

- Goal. The typical organization consists of people who cannot agree on why it exists. They think they have many goals and confuse them with strategies and objectives. I help an organization see that it has only one goal (why it exists) and that strategies and objectives must support that goal.

- Barriers. In systems thinking, these are the forces that interact to create a problem for an organization. They typically impede it from achieving its goal. When I meet an organization that wants to grow, I take it through a strategic planning process in which we identify these barriers, then develop strategies to break them down in order to achieve its goal.

- Mission. This is what an organization actually does. It's a simple statement that begins with the preposition "to." It must be Simple, Measurable, Actionable, Realistic, and Time based (SMART).

- Vision. What would the world be like if your organization could achieve its goal? Imagine that conditions were ideal and money was not an object. This is your vision.

- Information-gathering plan. This is an important step in my strategic planning process. It's important because organizations that want to achieve their goals have to find out how the outside world perceives them. This happens by developing and conducting a plan to gather information from stakeholders, or people outside the organization who have an interest, or stake, in it. The key activities involved in this step are interviews, focus groups, and a survey. I use the data gleaned from these activities to help an organization develop strategies to remove the barriers that impede it from achieving its goal.

- Core strategies. These are overarching statements that describe what an organization decides to do to break down the barriers that impede it from

achieving its goal. I maintain that an organization can successfully accomplish three to five core strategies in three years. More core strategies than that would fragment the organization's resources, and less than that would focus the organization so narrowly that it wouldn't effectively employ its resources.

- Objectives. Objectives support core strategies. A core strategy will have several objectives assigned to it. Accomplishing these objectives will enable an organization to accomplish the strategy.
- Action plan. An action plan is the implementation phase of a team building process, an action planning process, or a strategic planning process. All three processes have unique preparatory steps that develop sufficient data to develop an action plan. The action plan consists of three elements. They are the What, the Who and the When. The What contains specific actions an organization will take to accomplish its objectives and core strategies. The Who is the name of one or more members of the organization who is going to conduct each action. The When is the deadline by which people are going to conduct the actions. Without addressing the Who and When elements, the What actions will not take place because no one is accountable for accomplishing them.
- Consensus. What is consensus? By definition, it means agreement, accord, concurrence, unity, and other similar words. But must it be unanimous? When I facilitate a group of people, I may never get complete agreement on priorities. However, I always try to get everyone in the room to agree on the actions they want to take to accomplish their priorities. When someone will just not get on board, I ask, "What will it take to make you happy?" I try to get them to compromise on their view to take into account the view of the majority. Then the group will truly have unity on what it is going to do. I feel it's my responsibility to help the group achieve consensus in this sense of the word. Otherwise, there will be outliers who don't support the decision, and that's not good for the group.

- Capacity building. All organizations need to build capacity. I see this as the power to survive and thrive. I help organizations do this through my core practices of team building, action planning, and strategic planning.
- Group dynamics. In my practice of facilitation, group dynamics describe how people relate to each other. I call this concept “working a group.” Peter Senge calls it “skillful discussion.” Either way, it has to do with getting people to achieve clarity about thoughts and words. This will cure the common malady organizations have of wasting time in meetings because they can’t agree on anything. This way, they can gain consensus on priorities, decisions, and actions to take to implement them.
- Working a group. This is a term that describes a technique I use to help a group gain consensus on something. I base this technique on my belief that what other people have to say is more important than what I have to say. When I facilitate, the last thing I want to do is lecture people. An exception is when I have provide just-in-time training, which I explain elsewhere in this lexicon. I spend most of the time that I facilitate asking them questions. I usually ask questions the answers to which I already know. When people articulate those answers, they own them. Then I ask other people what they think about answers they hear. This confirmation or disagreement helps build consensus and teamwork.
- Just-in-time training. I borrowed this concept from the U.S. Coast Guard when I trained with Organizational Dynamics, Inc. in 1991 to become a facilitator. The idea is that as a facilitator, I provide some training to a group of people just before we do something that requires specific knowledge. For instance, when I conduct a SWOT analysis with a group during my strategic planning process, I explain how they will relate the quadrants of the SWOT matrix to each other in order to envision potential strategies that will enable them to achieve their organizational goal. See more about the SWOT analysis in this lexicon.

- Fund-raising strategies. A fund-raising strategy is a technique organizations can employ to raise revenue to implement activities they want to conduct. I can facilitate the development of such a strategy for an organization independent of other capacity-building steps, such as team building, action planning, or strategic planning. I can also facilitate it as an adjunct to a strategic planning process. If an organization develops strategies to achieve its goal, but doesn't have the funds to implement one or more of them, it may need to follow up with the development of a fund-raising strategy.
- Ground rules for meetings. Ground rules help organizations to maintain decorum during meetings and to make the best use of their time. An example of a typical ground rule that organizations make is, "Don't interrupt one another," or "Respect each other's point of view." I set a few ground rules of my own that I don't necessarily announce to a group. They include starting the meeting on time, engaging everyone in the group productively, and ending the meeting on time.
- Focus groups. Focus groups that I conduct are small (five to ten people) and consist of people I hand-pick to participate. I choose people who are interested in the organization I am working with, but are not in the organization. I need people who are knowledgeable and well-spoken. I meet with the focus group for two hours and mine their brains for their perspectives about the organization.
- Building relationships. In a narrow sense, building relationships is key to establishing trust within a group. This includes the trust that has to exist between the group and me as the facilitator. How do I build relationships? Mainly through honesty and integrity. If I tell the group that I'm going to do something, or not do something, I live up to my word. Trust means they can count on me to come through for them. In a larger sense, relationships are about building community. Getting businesses to work together through civic engagement (networking or collaboration) yields relationships in community that can spur economic development.

- Breakout groups. Getting a large group of people (20 or more) to “break out” into smaller groups serves two purposes. First, it enables more people to engage a problem in a very short period of time (30 minutes). Second, it brings more brain power to bear on the problem than is possible when the whole group is together. This is true because it’s not as easy for people to be reticent and get away with it in small groups as it is in a large group. In a large group, I’m the only facilitator. Before I turn breakout groups loose, I empower someone in each group to facilitate that group. When the whole group reassembles and the breakout groups report on their outcomes, an amazing amount of data emerges that the group can use to construct strategies, objectives, and action items.
- SWOT analysis. This concept is abstract and hard to convey to people who are not familiar with group process. However, it has considerable power to yield ideas for solving a problem. In the case of strategic planning, the problem is developing strategies to remove barriers that impede an organization from achieving its goal. The SWOT analysis is the key step in my entire process. It starts by gathering information from external stakeholders through interviews, focus groups, and surveys. Next, I, as the facilitator, condense the data into a matrix that lays out the stakeholders’ perspectives about the organization’s strengths, weaknesses, opportunities, and threats (SWOT). Then the group works in breakout groups to see how these factors interrelate to form potential strategies.
- Dialogue. Dialogue is meaningful conversation people have with each other. Conversation is not meaningful unless there is a free exchange of information. It is not lecturing people or talking to them. My use of dialogue in facilitation involves engaging people and getting them to engage each other. I do this by managing group dynamics. This is the way people in a meeting interact with each other. Peter Senge calls it skillful discussion. It has to do with the way I draw people out and get others to comment on what they say. This is essential in building consensus within a group on anything.

- Branding. There's a difference between marketing and branding. Marketing gets people to buy your product. Branding gets people to know you first, and to buy your product second. In my practice, I sell a service called facilitation. I hope to do that, however, by getting my brand out to the public. I am not Tom Romito. I am Tom Romito Facilitator and I have a logo, which is this:



By sharing the content of my social media with the public, I hope to get people to know who I am, what I do, and what I can do for their organizations. If they like me, they'll buy what I have to offer. Branding first, marketing later.

- World-wide healing. So what is this term doing in my facilitator lexicon? Well, many organizations struggle trying to achieve their goals, and they struggle because their efforts are fragmented and unfocused. They need to make a change, and I believe they will do so when they feel the need to heal. Through my core practices, I help them to heal their differences and achieve their goals. Think of our government and our country as great big organizations. They struggle and they need to heal. As a practitioner of reiki, a healing art, I circle the globe with healing energy once a month. The combined efforts of many reiki masters like myself create a continuous band of healing energy around all nations. If enough organizations heal, the nation and the entire world will heal. Am I dreaming? Well, as John Lennon said, "You may say I'm a dreamer. But I'm not the only one. I hope some day you'll join us, and the world will be as one."