



De-Mystifying Board Development Programme

Workshop 4

Workbook

Monday 22nd April 2024

6 How do we find the right facilitator?

6.1 Board development facilitator qualities, roles and styles

Bullivant cites the quality and role of facilitators as being essential to the effectiveness of interventions for board development. He says that good facilitators need to be confident, experienced, able to listen as well as talk, flexible, wise and experienced, and he adds that the roles that facilitators can play are as critical friends, expert advisors and challengers.

Chambers and Higgins indicate that facilitators can be used in at least two distinct ways, either as a single intervention to do a specific piece of work, for instance a board away day or a retreat, or to build up a long-term relationship with a board, for example to aid in longitudinal board development. They identify five different styles of facilitation that can be used to aid a board:

- acceptant – involving listening, encouraging storytelling and exploring narratives
- catalytic – helping the board to gather information, synthesise and make sense of the information and use the information to make better, more grounded decisions
- confrontational – offering challenge to ensure that the organisation and the board are congruent in word and deed
- prescriptive – providing expert advice to the board on whatever areas the board are deficient in
- reflective – holding up a mirror that situates the board in the wider system or sector environment and using the facilitator's expert knowledge of the context for peer comparison and insight

Their exploratory empirical study found that although all five styles were found to be relevant according to circumstances, the confrontational facilitating style was most useful and the prescriptive style was least useful.

6.2 Health and care sector board development facilitators

In addition to the qualities, roles and styles described above, health and care sector board development facilitators need:

- a deep understanding of :
 - the health and care landscape including macro challenges, policy drivers and structures
 - the role of the board they're working with
 - the challenges facing senior health and care leaders
- a strong ability to :
 - operate reflexively
 - gain credibility with board members because of previous work with similar participants and/or their approach, behaviours and skills
 - understand and work with complex power relationships and group dynamics
 - work inclusively and balance compassion and challenge
 - work emergently with what happens in the group in the moment

- a range of diagnostic, design and delivery skills to help them:
 - offer stimulating inputs
 - provide experiential learning
 - give robust feedback
 - facilitate difficult conversations
 - create positive outcomes

One of the most important skills mentioned above is the ability to balance compassion and challenge. To stimulate transformational development, facilitators need to interrupt existing dynamics in ways which engage rather than disengage the board. This is crucial because if there are already negative dynamic in board cultures, facilitators can easily become part of them if they stimulates resistance. They need to be able retain the respect and motivation of board members whilst offering challenges and they will only be able to do so if they have built one-to-one relationships with them via the diagnostic process and can demonstrate compassion and expertise in the ways in which they operate.

In addition to assessing facilitators knowledge and skills, it is vitally important to consider the specific contexts they will be working in. As they will need to engage with the existing power dynamics of the boards they develop, it is crucial to choose facilitators who the relevant chairs and CEOs feel comfortable with. This means that chairs and/or CEOs need to be part of the selection process.

Given all of the board members will be either consciously or unconsciously locked into the dynamics of their board it is impossible for any of them to facilitate their own board development as they won't be able to escape their existing role and relationships so they'll be unable to create the neutrality required for facilitation. It is also challenging for anyone employed in the board wider system to facilitate board development interventions as the participants are likely to find it difficult to expose their vulnerabilities in front of someone who they may have organisational connections with and who is likely to be more junior than them and they may also find it difficult to trust them in terms of confidentiality. For these reasons board development facilitators are usually independent practitioners who are commissioned for specific interventions.

6.3 Facilitator selection pitfalls

There are a number of potential pitfalls in selecting facilitators for health and care board development work, the key ones of which are described below.

Firstly, the pool of facilitators who possess the necessary knowledge, skills and qualities is relatively small and so in the absence of tenders from appropriately experienced facilitators, it may be tempting for commissioners to compromise on some of what they are looking for. However, if for instance they select facilitators who can handle board dynamics but don't understand the health and care sector, the facilitators will be unable to develop credibility with their participants and they won't be able to offer the most appropriate interventions. It is therefore worth commissioners ensuring that the work is marketed in ways that appeal to experienced and skilled practitioners and that commissioning processes are transparent,

user friendly and have generous response times built in, as this will increase the pool of people who submit tenders.

Secondly, many commissioning processes rely on written responses and don't include requests for references. It is relatively easy for facilitators to write correct answers to questions about good health and care board development, but that doesn't mean they have the ability to deliver it. It is therefore important that commissioning process questions ask for examples of previous experience and that facilitators are asked for references. For large and complex pieces of board development work it is useful for chairs or CEOs to talk to referees.

Thirdly, chairs and CEOs will be busy and may be happy to leave selection processes to commissioners. However, given the power dynamics that play out in board development interventions, it is important that chairs and/or CEOs make time to get involved in selection processes so that they and everyone else is sure that they trust the chosen facilitator and can co-design parts of the intervention with them where appropriate. Their involvement will also enable them to take responsibility for the process if it doesn't go as well as intended.

7 How do we support and/or deliver board development?

7.1 Supporting interventions

To support interventions, it is vital that staff work closely with board chairs or CEOs from the outset. It is equally important for them to work closely with facilitators once they have been selected. It is difficult for them to observe the board development process as it would potentially make board members more reticent about disclosing some of their feelings and thoughts, but it is useful for them to check in and hear how things are going after each session. As well as monitoring progress it would be helpful if they could evaluate the intervention at the start, middle and end and six months after the intervention has finished.

7.2 Delivering interventions

If staff are going to deliver some interventions in the future, it will be important for them to identify which ones they will be able to provide themselves and which they will need to continue to commission facilitators to do. Having identified those that they will deliver themselves, they will need to identify their knowledge, skill and experience gaps and devise ways of filling them, for instance by shadowing board members and/or acquiring new tools.

NOTES

