

THE DEVELOPMENT OF AN EFFECTIVE FACILITATOR – AN INTERIM  
CURRICULUM DIRECTOR’S JOURNEY

by  
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## ABSTRACT

This action research project explored the journey of a classroom educator as she transitioned into the role of curriculum director and progressed toward becoming an effective group facilitator and administrator. Group facilitation is an important aspect of a curriculum director's job as she works with a multitude of groups with varying degrees of experience, endless combinations of personalities and an array of purposes and time frames. Group facilitation requires a working understanding of personality and communication, an awareness of social and emotional intelligence and the ability to moderate one's own communication style and presentation to meet the demands of a particular situation.

In this paper I present a journey that began with an examination of personality and moved into the realm of communication style, group dynamics and social intelligence. Each of these is closely tied to effective facilitation as well as administration in the field of education. The focus question explored in this paper is "How can I become a more effective group facilitator?" It was addressed through a variety of qualitative and quantitative collection techniques including the Myers-Briggs Type Indicator, Communications Style Inventory, critical friend's oral feedback, group member interviews, spontaneous feedback, my professional journal, critical friends survey, and three facilitator effectiveness surveys. These varied data collection techniques were triangulated and cross-examined to support claims made in the discussion. These claims include increased effectiveness as a group facilitator which encompasses improved communication skills and increased ability to be socially intelligent in a variety of situations. The outcome of this self-study was my transformation from a novice district level administrator and group facilitator to one with more experience in self-evaluation and self-reflection and an emerging ability as an effective group facilitator.

## CHAPTER ONE

### INTRODUCTION

An effective facilitator is a key component in the process of curriculum development and decision-making. Curriculum development is a time consuming, but critical aspect of education and must be provided the appropriate guidance from a facilitator familiar with the stages of group development, various decision making models and an understanding of communication style as it relates to both the verbal and non-verbal cues every individual provides on a regular basis. Webster (2000) defines facilitation as “increased ease of performance of any action.” Each organization has its own unique definition of the facilitator’s role within the context of their work and their defined need. Bob Chadwick of Consensus Associates (n.d.) describes the role of the facilitator as the “guide on the side, not the sage on the stage.” A facilitator provides structure for the meeting, has a clearly designed process (agenda) and avoids wasting people’s time. In addition, an effective facilitator should be aware of the need for advanced preparation, a well designed agenda and meeting objectives, possess the ability to accurately “read” the group and direct participation, create a safe atmosphere for all participants and be the group’s collective memory (Ruetz, 2004). Inherent in reading a group is self-knowledge, also known as emotional intelligence and

defined by Goleman as the capacity to manage our emotions and our potential for human relationships (Goleman, 2006). With these ideas in mind, an effective facilitator must be self-aware, considerate of others' physical needs, be well organized and cognizant of the psychological progress group members are making as the group moves toward their stated goal or objective.

In this action research project, I explored my understanding of group facilitation from the viewpoint of a participant and began a literature review to expand my knowledge of facilitation from a theoretical viewpoint. Through several data collection strategies during a nine-month period, I collected information about my effectiveness as a group facilitator, comparing this information to my understanding of personality, social intelligence, change process and educational leadership.

### Context

During the last six years I have been a teacher at Sacajawea Middle School in Bozeman, Montana. Bozeman is the fourth school district in which I have worked during a teaching career spanning twenty years. During that time I worked for five years in a small semi-rural middle school with a large minority population and a diverse socioeconomic base teaching science; I taught science and honors science for three years in a large, urban intermediate school encompassing families speaking 26 languages; three years in an urban high

school populated by students from upper socioeconomic status homes; and six years teaching science and health enhancement at Sacajawea Middle School in Bozeman, Montana.

With an enrollment of approximately 5,200 students taught by 500 highly qualified teachers, the Bozeman Public School system encompasses a large geographic area. The school system, made up of two districts -- Elementary District No. 7 and the Bozeman High School District, includes 1100 square miles and nine elementary districts -- Bozeman, Cottonwood, LaMotte, Monforton, Gallatin Gateway, Anderson, Sedan, Malmborg and Ophir. The district is governed by a Board of Trustees -- seven citizens elected by the voters of the elementary district and two Trustees-at-Large elected by citizens of the rural elementary districts.

In March, 2006 I was invited to fill a temporary position in the Bozeman Public Schools' central office as acting Curriculum Director and Grants Coordinator and, in June, 2006, was offered a one-year, interim contract. The duties of the position include coordinating grants for the district, fulfilling reporting requirements for No Child Left Behind (NCLB), coordinating district and state assessments, organizing and implementing professional development, coordinating curriculum development and materials selection as well as the budgets associated with each. Finally, I participate in a number of committees including the Technology Steering Committee, Professional Development

Committee, and the Wellness Advisory Committee. Each of these committees is made up of volunteers with an interest in the work performed and a commitment to education. In addition, I co-facilitate the K-12 Assessment Committee and am lead facilitator for each of the Curriculum Leadership Teams (CLT) – math, science and social studies.

During the 2005-2006 school year we revised the curriculum review process, moving away from an superficial review of standards and materials adoption to a research based process that begins with the formation of a vision for learning. The new process includes a curriculum committee model referred to as the Curriculum Leadership Team (CLT) whose members are chosen from a field of applicants willing to make a three-year commitment of mostly volunteer work. Each CLT is comprised of one teacher from each grade level and every school in the district, a special education teacher, the Peaks and Potentials (gifted and talented) coordinator, three site administrators representing the elementary, middle school, and high school levels, two community members, the Curriculum Director and the Assistant Superintendent for Curriculum and Instruction. Selection of members includes consideration for those with experience in Special Education, and those currently serving on the K-12 Assessment Committee and the Technology Steering Committee. In this manner the work of each CLT represents a wide variety of interests and experiences throughout the district.

The work of each CLT is as follows: establish a vision, participate in professional development to establish an understanding of best practices, conduct professional reading and subsequent discussion, review and revise curriculum standards and learner results, recommend materials for adoption to the Board of Trustees and review and revise district level assessments. The commitment level of each member must be maintained and encouraged by the group facilitator and adequate planning is essential in order for each group to accomplish the vast array of objectives described above. The Math CLT was the first of these committees to be formed and has been working since late February, 2006. I joined the Math CLT in early April, 2006 and have now assumed facilitation of the group. In September, 2006 we completed selection of the Science and Social Studies CLTs, both of which met for the first time in October of the same year.

Throughout the period from March, 2006 through May, 2006, I conducted action research in the area of personality in which I invited a group of family members and peers to participate in the Myers-Briggs Type Indicator. Using this tool each participant evaluated their own personality as well as mine. In turn, I evaluated my own personality as well as each participant's personality. The result of this study was an increased level of self-awareness that led me to expand my action research study into the area of effective group facilitation.

### Problem

Self-deception "blinds us to the true cause of problems, and once blind, all the 'solutions' we can think of will actually make matters worse. That's why self-deception is so central to leadership - because leadership is about making matters better" (The Arbinger Institute, 2002). In order to lead we must be able to express ourselves fully and in a manner that will gain the cooperation and support of others (Doyle & Smith, 2001). These traits are important to every facilitator regardless of the task, the setting, or the makeup of the group.

As a new administrator with limited formal training in leadership or group facilitation and a need to facilitate several groups, each with responsibility for making clear, concise, research based recommendations to the Board of Trustees, I determined that my action research should focus upon improving my ability as an effective group facilitator. The only formal training I have had in the area of facilitation, "Beyond Conflict To Consensus," was conducted by Bob Chadwick of Consensus Associates (Chadwick, n.d.) for Bozeman Public Schools in March 2004. Approximately 40 teachers and administrators participated in this workshop, laying the foundation for district level negotiations and consensus style decision making at the building and district level. Many organizations, including Bozeman Public Schools, use a consensus model to resolve or proactively avoid conflict within groups or between individuals, building

capacity within these groups in the process.

I selected four groups as the focus of my study: the Math Curriculum Leadership Team (CLT) which had been meeting for approximately four months when I began as facilitator, the newly formed Science CLT and Social Studies CLT and a loosely organized group of “lead” teachers engaging in self-discovery and academic/curriculum work in the area of Indian Education. The Math CLT, composed of thirteen teachers, two parents and several administrators, was chosen as the primary study group during the first part of the action research due to the fact that it had frequent meetings scheduled during the research period, giving me ample opportunity to interact with them on a regular basis. The drawback with this group was their preconceived ideas about group facilitation under the direction of their previous facilitator. The Science CLT and Social Studies CLT, with compositions similar to the Math CLT, were chosen for inclusion in my action research for two reasons. First, these two groups began under my direction and, therefore, had no preconceived notions regarding the CLT process or the role of the facilitator. Second, most of the members of the group are people with whom I have never worked and none had any experience with me as a facilitator. The Indian Education lead teacher group, composed of thirteen teachers, was chosen because they work together on a biweekly basis and are charged with gaining expertise in the area of Indian Education and designing lessons, a very different task than the three CLT groups. It was hoped

that through comparison of feedback from each of the groups, patterns would emerge that would be helpful to me in the process of improvement. Additionally, the inclusion of all four groups provides substantial data from multiple sources which allows for using triangulation techniques during data analysis and deepens the ability to make judgments about my facilitation skills in different contexts with a variety of different group members.

In considering how to approach the problem of my limited training and experience in group facilitation there were a number of variables that had to be taken into consideration. The most important of these was the fact that the majority of each group's work is done on a voluntary basis and therefore time must be utilized efficiently. As a result I was hesitant to spend much time working on group dynamics and personality profiling. I was also somewhat reluctant to move a group of teachers through exercises that some may consider to be frivolous, time-wasting activities and therefore counterproductive to my role as facilitator. Another area of apprehension was the nature of candid, unrecorded discussion within a group. Initially, I considered using meeting transcripts or some type of recording to collect information about my work as facilitator; however, I was concerned that this would compromise the trust I needed to build between group members and me by creating an ethical dilemma - that of creating a potential perception in group members minds that judgments and decision making power as Interim Curriculum Director might be based on confidential

information gathered through the action research project. McNiff, Lomax and Whitehead (2003) believe that the type of influence we have depends upon how we act and the “idea that our potentials for influence are embodied in the way we act implies that influence is in the quality of the relationships” (p. 48). The decisions I made regarding data collection techniques were driven by the consideration of the influence of my actions on the individuals with whom I had chosen to work during the course of my self study.

With these concerns in mind I decided to abandon the transcript approach in favor of participant surveys and interviews, spontaneous participant comments, my journal, and feedback from critical friends. In this manner I believe I was able to address my need for feedback as well as the group's need for balanced power and candid, unfettered discussion. Without an imbalance of power, trusting relationships could be built among the group members and between the group and me.

One final problem is the fact that I had chosen to collect data from several different groups each of whom had a slightly different purpose and composition. Despite the fact that purpose and composition would act as uncontrolled variables and likely influence the outcome of the research, I decided that the benefit of including these groups – creation of a large data base and a greater range of responses – would, when triangulated with other data collection strategies, provide enough quality information about my facilitation attempts in a

variety of contexts to offset the potentially negative aspects of variability. One of the central premises of action research is that it focused on learning and is practitioner based (McNiff, et al., 2003). The learning that could occur as a result of interactions with a variety of groups and individuals as I progressed toward becoming an effective facilitator and educational leader outweighed all other considerations.

#### Focus Question

My focus question for this action research project "How can I become a more effective group facilitator?" is based upon the needs and moral struggles described in the problem section above. As stated previously, I have little formal training in group facilitation although I have worked with numerous student groups and have facilitated groups of adults in both the public education system and GSUSA (Girl Scouts, USA) for the past twenty years. Within this focus question I have integrated two sub-questions:

SQ1: How can I use my understanding of leadership trait theory, specifically social and personality trait theory, to improve my performance as a group facilitator?

SQ2: How can I effectively utilize the strategies learned in consensus training to facilitate group decision making?

The exploration of leadership trait theory, personality theory and social

intelligence theory should increase my understanding of the many variables at play when communicating with and facilitating a diverse group population. The principles advocated by the consensus decision-making model will enhance my ability to lead a group through complex decisions while honoring individual needs and contributions.

### Organization

In order to organize my thoughts and methodological ideas for data collection and analysis, early in my action research I constructed three organizational tools. The first tool, a concept web (Appendix A), was designed to illustrate the connectedness of the various aspects of group facilitation. Construction of this graphic organizer allowed me to visualize the variables that would impact the outcome of my action research and decide how to approach the issue of multiple variables and the relationship of the variables to my understanding of the facilitator's role in a group. Van Manen (1990) reminds us to "constantly measure the overall design of the study/text against the significance that the parts must play in the total textual structure" (p. 33). Careful examination of the concept web allowed me to reflect upon the focus of my action research, facilitation, and realize that although the variables in the study could not be controlled, their impact could be considered and discussed within the context of my journey toward becoming an effective facilitator. As a result of this heuristic

tool I developed a clearer understanding of the complex nature of group facilitation.

The second organizational tool, a vee diagram (Appendix B), was constructed in November 2006 and was designed to systematize the various aspects of the project which had already been completed and obliged me to reflect upon my value claims, the foundational knowledge on which these claims were made and the data that had been collected. In addition, it was a valuable tool for identifying gaps in my research that needed to be filled. The essence of the vee diagram as a metacognitive tool is to cause reflection and systematic analysis of a particular concept or idea. The vee diagram, constructed after the concept web, was considerably more valuable to me as its construction afforded me the opportunity to carefully examine all aspects of my project and question my notions about the validity of action research. The design of the vee diagram, with the point containing the key objectives of the project, helped me delineate the conceptual aspects of my action research from the methodological and understand their interaction.

Finally, Table 1, Data Collection Techniques, was designed early in the pilot study and expanded as new collection strategies were identified and included. This table was very beneficial as it provided an overview of the various data collection strategies in my action research and delineated the roles that each collection technique would play in triangulating data. The methods, data

and interpretations as well as the appendices are all organized around the order of the data collection techniques identified in Table 1. In this manner I was able to organize my thoughts and reflect upon the data in a systematic manner.

## CHAPTER TWO

### LITERATURE REVIEW

According to Goleman (2006) there are four domains of emotional intelligence: self-awareness, self-management, social awareness and relationship management. In order to develop into an effective leader one must first be aware of emotional needs of self and others and be able to accurately self-assess. As we become self-aware we learn to control our emotions while allowing others to see us as transparent and optimistic while remaining adaptable. Along with these two domains, effective leaders exhibit empathy and organizational awareness while utilizing transformational leadership in which teamwork and collaboration are valued and conflict management is a tool whereupon our goals are obtained (Wilson, 2005).

In order to be efficient and avoid wasting people's time, a successful facilitator must communicate effectively. Communication style is very much a reflection of one's personality. Jung believed every individual's persona was composed of various archetypes or tendencies to experience life in a particular manner (Briggs-Myers & McCaulley, 1992). These same tendencies are inherent in our choice of communication method as well as our communication style. We each have a communication style that is a blend of how we have learned to

communicate and methods of communication that are compatible with our basic personality. The idea of personality and personality profile was developed by Carl Jung in the 1920's. He believed that every person has specific personality tendencies that drive how a person interacts with others. His book *Psychological Types* (as cited in Briggs-Myers & McCaulley, 1992) describes his ideas about human nature and, specifically, personality. In the mid-1950's Isabel Briggs-Myers and her mother Katharine Cook-Briggs worked together to read and attempt to understand personality typing according to Jung's writings. The result of their effort is the MBTI or "Myers-Briggs Type Indicator" (Briggs-Myers & McCaulley, 1992). There are many other personality type tools that build upon Myers' work including the "Keirsey Temperament Sorter" by David Keirsey (Keirsey, 2005) and the "Cognitive Style Inventory" by Ross Reinhold. In addition, many other personality profile tools have evolved separately. Despite the differences in these tools, they are all founded on the premise that every individual has tendencies in their personality that are the result of events in one's life as well as genetic predisposition. Each of these tools acknowledges the idea that personality is malleable and continues to change throughout the life span of every individual. How we choose to exercise the tendencies of our personality is a matter of understanding and choice.

For example, as an individual with personality tendencies (as determined by the Myers-Briggs Type Indicator) in the areas of extroversion and judging I

have tended to be very straightforward, impatient, focused and somewhat rigid in my thinking and interactions with others. Running counter to these tendencies is a balance of intuitiveness and feeling which allows me to see both sides of an issue and feel empathy toward others. Learning to channel these tendencies and control their usefulness in my communication (both conscious and subconscious) with others is a key component of learning to “act wisely” and be “intelligent not just about our relationships but also in them” (Goleman, p. 11). This fundamental connection between our personality as determined by our genetics, our environment, and our communication with others is the essence of both effective facilitation and effective leadership.

In addition to being prepared and reading the group accurately, an effective facilitator creates a safe atmosphere for participants. According to Maslow’s hierarchy of human needs there are two types of need: deficiency needs and growth needs. In order to grow (psychologically) our deficiency needs such as bodily comforts (physiological), safety, a sense of belonging and competency must be met (Huitt, 2004). Once these basic needs have been met, the individual may then begin to focus upon growth needs in the domains of cognition, aesthetics and “self-actualization” (the ability to realize one's potential) (Huitt, 2004). In order to meet participants’ needs, the facilitator must again “read” the group and know when group members are in need and whether the need is physical or psychological. Individual needs may be addressed by

considering physical comforts such as the need for periodic breaks and availability of food and beverage during a prolonged meeting. Individuals may also have their psychological needs met by establishing a system of participation to ensure that all group members are engaged to a degree that meets their comfort level and avoids anxiety produced by inequitable participation.

When a group is actively engaged in decision making or other activities involving an innovation the result may be varying “stages of concern” (Hall & Hord, 2006). In this respect, a group is a social system in which individuals play a variety of roles. Hall & Hord, in their book *Implementing Change, Patterns, Principles and Potholes* (2006), delineate five categories of adopters: innovators, early adopters, early majority, late majority and laggards. Each of these adopter categories correlates at various times and in various situations with one of six stages of concern: awareness, informational, personal, management, consequence, collaboration and refocusing (Hall & Hord, p. 139). A facilitator’s failure to observe, understand and address the needs of each individual could create disconnect within the group and lead to ineffective communication between the group and the facilitator and between individual members of the group. During this type of group interaction is when the facilitator must be most effective in understanding the group’s progress through the various stages of group development.

According to Blair (2006) every group moves through four stages of group development. These stages are "forming", "storming", "norming" and "performing". In order to facilitate group work one must consider that both the task and the process of group work affect outcome. Blair explains that an effective facilitator takes action when necessary to keep absent group members informed, creates "synergy" which increases productivity and, finally, an effective facilitator can be a catalyst for change, guiding the process and smoothing difficult interactions through careful listening and timely, honest response. In other words, an effective facilitator is emotionally intelligent, is aware of the impact of personality and communication style, takes into account participant's needs and is aware of group members' stages of concern. This is a tall order – one which I hoped to begin to address by focusing on my communication style as it relates to my ability to effectively facilitate group work.

## CHAPTER THREE

### METHODS

This section describes the research methods used in my action research project. My research question “How can I become a more effective group facilitator?” required the use of numerous data collection techniques through which I actively explored my personality, my communication style and other people’s perception of me as a group facilitator. My focus is rooted in the principles of action research as articulated by McNiff, et al. (2003) and Mills (2003). The research methods in this action research project were also influenced by the intent of phenomenological research traditions articulated in the phrase “establishing a renewed contact with original experience” (Van Manen, p. 31) through self-study and reflection. This form of research required that I think deeply about my own experiences, the intent of my actions and the outcomes produced by my actions. To do so, I chose a diverse set of tools that would allow me to solicit the opinions of those individuals best suited to provide feedback – colleagues, co-workers and the teachers on the receiving end of my work as a group facilitator – and compare them to my self-perception. This comparison was made with the understanding that self-perception and the perception of others are so closely intertwined that they are mutually affective. In other words, the

nature of my research increased the quality of experience for me while also impacting those with whom I worked.

Data collection in this action research project included the following qualitative methods: Myers-Briggs Type Indicator, Communication Style Inventory, critical friend's oral feedback, group member interviews, spontaneous feedback and my professional journal. I used established inductively based qualitative data analysis techniques for this data and two forms of data collection, a critical friend's written questionnaire and a Facilitator Feedback survey, which were analyzed quantitatively. Utilization of a variety of collection techniques allowed for data triangulation and cross-examination of multiple examples to support claims made in the conclusion of the study. Each collection technique was carefully selected to help me "be constantly mindful of one's original question" (Van Manen, p. 42) and address at least one sub-question in addition to the focus question "How can I become a more effective group facilitator?" The following table summarizes the data collection strategies and their connection to the research question.

Table 1. Data Collection Techniques

<b><i>Collection Technique</i></b>	<b><i>Information Yield</i></b>	<b><i>Alignment with Focus and Sub-questions</i></b>
Meyers-Briggs Type Indicator	Personality profile to increase understanding of the role of personality in both communication and group facilitation.	Focus: How can I become a more effective group facilitator?
Communications Style Inventory	Communication style for each group member - identify needs	SQ1: Will an understanding of leadership trait theory...?
Critical Friends Written Questionnaire	Specific feedback regarding my communication strategies.	SQ2: How can I effectively utilize strategies...?
Critical Friends Oral Feedback	Solicited feedback following group discussion.	SQ2: How can I effectively utilize strategies from consensus training...?
Facilitator Survey	Ranks my effectiveness as a group facilitator.	SQ2: How can I effectively utilize strategies...?
Participant Interviews	Feedback following the facilitator survey regarding strengths and weaknesses of my facilitation.	Focus: How can I become a more effective group facilitator?
Spontaneous Feedback	Unsolicited feedback provided by various members of the groups.	Alignment with focus questions and sub-questions.
Professional Journal	Self-reflection regarding my strengths, weaknesses and ideas for continued growth.	Focus: How can I become a more effective group facilitator?

### Myers-Briggs Type Indicator

The first form of data collection, a version of the Myers-Briggs Type Indicator (MBTI), also known as the Jung Typology Test, was chosen to address my initial question regarding the perception of personality from various individuals compared to the self-perceived personality. I began by selecting a tool that would be easy to use, yet based upon sound research. The tool is a short, four item inventory based upon the original MBTI. It is web based and yields the same four-letter personality profile as the full length MBTI. In order to assure reliability I performed both the full-length MBTI and the short, four item inventory online. Both yielded the same personality profile for both me and one member of my critical friends group. The test is available online (Humanmetrics, 2005); however, in the interest of timely administration and given the busy schedules of the seven participants, the indicator was also printed and distributed with an accompanying set of instructions for completing the survey. Individuals were given seven days to return the completed indicator to me either electronically or as a hard copy. The results from all but one of the six participants were compiled in a chart (see appendix C) for comparison to the responses of other participants and to my own perceptions.

### Communications Style Inventory

The Communication Styles Inventory, administered to members of the Social Studies CLT, Science CLT and the Indian Education Lead Teacher Group in October 2006, was included as it allowed me to transfer my understanding of personality and its influence on personal relationships to a study of a variety of individuals with differing communication styles. The inventory was not used with the Math CLT as they had already been meeting for several months under the guidance of the previous facilitator and were well established as a group. Despite early consideration of using a personality profile tool with these groups, I decided to focus upon communication style as it would provide information that could be inherently more helpful in learning to facilitate each group.

There are a number of communication style inventories available; however, this tool was readily available and had been adapted from a popular inventory available in the book *The Platinum Rule* (Alessandra & O'Connor, 1996) and used by Orange Coast College (Orange Coast College, 2006). A paper copy of the inventory was distributed to twenty-eight members of the Science and Social Studies CLTs during a joint meeting, completed by each individual and the results returned without participant identification in order to provide a degree of anonymity. I then asked participants to indicate which group was representative of their highest score by moving to a location within the room.

Grouping was followed by discussion of the results of the inventory and the implications of communication styles for group dynamics. This discussion acted as the foundation for each group to begin “forming” as a group and as a basis for appreciating the necessity of communication that is considerate of the individual needs of group members. The Indian Education group participated in the survey the following week. Two of the thirteen members of this group also belong to either the Science or the Social Studies CLT and were asked to take the inventory again and compare their results. In both cases the results of the second inventory mirrored the original inventory one week prior. Because this group is smaller we did not physically move to locations within the room, instead indicating dominant style by a show of hands. We had a similar discussion immediately following administration in which group members reflected upon the value of including group members with various styles. In both situations individuals discussed the distribution of styles and the possible impact on group dynamics. The results of the Communication Style Inventory are shown in Figure 2 and in Appendix D.

### Critical Friends Feedback

Critical Friends Oral Feedback (Appendix E) represents the opinions of members of my critical friends group following various meetings in which I either participated or facilitated the proceedings. This group of individuals was asked to

provide me with on-going commentary regarding my communication style in general or, specifically, my efforts in the area of group facilitation. Methods of providing feedback included the individual approaching me directly after a meeting, calling to leave me a message on my voicemail or sending me an email message. On a regular basis, I approached each individual and asked for feedback related to a recent event while specific interactions were fresh in my mind. This information was recorded in an electronic log on my computer and reviewed periodically.

The Critical Friends Written Questionnaire, found in Appendix F, was designed to obtain written feedback from a number of individuals with whom I interact on a regular basis, each in a different context. This questionnaire was first distributed in April, 2006 during the early stages of my project and following the administration of the MBTI. The questionnaire was self-designed with the intent of collecting specific information regarding my ability to communicate and to ascertain whether others' perception of me mirrored my self-perception. It was distributed again in November, 2006 after eight months of work on this project. In both cases the questionnaire was provided as a hard copy and critical friends were given one week to complete and return the questionnaire to me anonymously. The results were then compiled as a chart (Figure 2) and examined with similar responses identified, especially those that could be perceived as strengths and weaknesses. The summary of open-ended

responses represents an overview of the responses written and includes the number of times a particular response was provided.

### Facilitator Effectiveness Survey

The Facilitator Effectiveness Survey was administered three times via a web-based program known as Survey Monkey (surveymonkey.com, 2007). The initial survey was designed to provide me with a broad swath of information regarding both my work as facilitator and the effectiveness of various forms of communication being used with the group. Each of the groups surveyed were made aware of my work in the area of group facilitation and advised that I would be conducting a survey within the following two weeks. The first survey, the Facilitator Effectiveness Survey 2006, was conducted with the Math CLT in November, 2006 after seven months of sporadic work with the group. The second survey was done simultaneously with the Science CLT and Social Studies CLT in January, 2007 after I had facilitated four monthly meetings with the two groups. The final survey was conducted with the Indian Education group in February, 2007 after four months of twice monthly sessions alternating between professional development/work sessions and evening lectures with an adjunct professor from Montana State University. The survey administered to the Social Studies CLT, Science CLT and the Indian Education group varies slightly from the original survey used with the Math CLT. The section regarding

communication tools was eliminated and replaced with additional questions regarding facilitation. The change was initiated due to the fact that the questions regarding communication tools did not reveal information that was helpful to me in understanding my effectiveness as a facilitator. Evaluation of the original survey also indicated the need for further specific information that could easily be obtained by replacing the communication tools section with additional facilitation questions.

With each survey an email message was sent to the group's listserv requesting anonymous participation in the survey along with a brief explanation of the purpose of the survey. Following each survey period the survey was closed, data compiled by the survey program, downloaded to my computer and cleared prior to opening the survey to the next group. Each time the survey was reopened it was assigned a new identification number that would prohibit any member of the previous group from entering the survey and taking it again. In addition, although the survey was anonymous, it was designed so that each participant could only complete and submit the survey one time. In this manner the feedback represents a variety of individuals with no duplication.

SurveyMonkey provides data compilation in the form of total number of responses to each questions as well as percentages. This information was copied into Microsoft Excel where charts and graphs were created to further analyze the data. The open-ended responses in the survey have been

summarized; when an open-ended response was repeated by several individuals it was included only one time.

### Participant Interviews

In addition to the quantitative and qualitative information gathered from the two Facilitator Effectiveness Surveys, eight members of the Math CLT were interviewed by phone or in person after I had compiled and examined the survey results. These were structured as “informal ethnographic interviews” (Mills, p. 58) designed to gather more in-depth information about survey responses and further my understanding about my group facilitation skills including communication style. Specifically, I wanted to know in which areas I was performing well and identify those which required more work. Contact was attempted with most members of the Math CLT and messages left when voicemail was reached. Within a 24-hour period, those individuals who were either contacted directly or returned the phone call were interviewed briefly. Each member was asked the question “*What have you observed during your interactions with me as a facilitator that would help me understand what I am doing well and in which areas do I need to focus?*” This question was also asked of several members of the Science and Social Studies CLT survey group and the Indian Education survey group in an attempt to clarify responses from their respective surveys and gain further insight into the needs of the members of these two groups. Three

members of the Science/Social Studies CLT groups and the Indian Education group were selected based upon their perceived honesty and candor. A larger sampling was not possible due to the time constraints of my project. The feedback provided by each of the interviews was compared to the data compiled from the Facilitator Effectiveness surveys. I looked for both clarification of the Likert scale data and information that would help me understand the brief written responses provided by participants in the survey. Due to the fact that not all group members chose to participate in the online survey, it is not known whether the individuals interviewed had also completed the survey. In the interest of anonymity no attempt was made to ascertain whether the participants interviewed had participated in the survey. The results of these interviews are included in Appendix I.

### Spontaneous Feedback

Spontaneous feedback is exactly that – feedback provided without solicitation and from a variety of individuals. In some instances I received an email from a member of one of the groups with whom I was working, several times an individual would approach me after a meeting and share their opinion and, in one case, an individual called me to discuss their views about the meeting and my work with the group. This type of feedback was invaluable as it provided me with another source of data for analysis. It was compared to the

feedback collected during the facilitator surveys, the individual interviews conducted following the facilitator surveys, the information contained within the critical friend survey and reflections in my journal. I looked for patterns of behavior that would help me evaluate whether or not I was making progress toward becoming an effective facilitator through utilization of the strategies learned in consensus training and literature review regarding personality trait theory and social intelligence theory. This feedback is located in Appendix J.

#### Professional Journal

The final source of information was my professional journal. This was an electronic log of my thoughts, attitudes and opinions regarding the work completed. I did not make entries on a daily basis, rather it was sporadic and reflected those periods of time in which I had made an observation or was thinking reflectively about a recent experience. Excerpts from this journal have been included in Appendix K as a basis for comparing and triangulating my perceptions with the data collected from external sources. Only those entries that pertained directly to this action research project have been included.

As Table 1 (above) and my descriptions illustrate, each source of data collected provided me with valuable information from varying perspectives designed to address my research question and my two sub-questions.

## CHAPTER FOUR

### DATA AND INTERPRETATIONS

Data collected in this action research study regarding my development as an effective facilitator are presented here to provide the reader with an overview and understanding of the information documented and methods of analysis utilized. Mills (2003) points to the need to connect findings with personal experiences and contextualize findings in existing theory and literature. I have utilized these approaches to help make sense of the variety of qualitative feedback collected through the course of my research. In addition, quantitative data has been analyzed by comparing percentages of data sets to one another in order to identify trends. Although Mills also advocates the use of “descriptive statistics” (p. 203), such as mean, median and mode to analyze data from sources such as Likert scales, I did not find this approach to be useful in analyzing my survey results. Instead, I focused upon comparing quantitative data converted into percentages to qualitative data and identify tendencies.

#### Myers-Briggs Type Indicator

The first data collection strategy, the Myers-Briggs Type Indicator (MBTI), enabled me to develop my skills of increased self-knowledge as well as the

ability to increase my understanding of other people's personality styles. The results of the MBTI are presented in Appendix C and include feedback from six of the seven participants as one individual did not complete the indicator. The results indicate that one individual profiled me as ISFJ (introvert, sensing, feeling, judging), two individuals profiled me as an ESFJ (extrovert, sensing, feeling, judging) and three individuals profiled me exactly as I profiled myself, ENTJ (extrovert, intuitive, thinking, judging).

The individual whose results were furthest from my self profile is my adolescent daughter with whom I have a close, personal relationship. Her analysis of my personality may have been different due to the difference in age and maturity, the parent-child relationship and the fact that at home my tendencies are much more introspective and reserved than at work or in social settings. Due to the fact that she is an adolescent, our relationship necessarily involves a different degree of authority than the relationships among my peers. Each of these variables may have impacted her evaluation of my personality.

The two individuals who profiled me as ESFJ are of similar age and educational background, both are ten or more years older than I, and both are trusted individuals with whom I have had close contact for several years. The disparity between their profile of me as an ESFJ and my self-profile may be explained by the similarity in the relationships I have with them. Both individuals have observed me in times of despair and have been close confidants. Their

similar perceptions could also be the result of their age and corresponding similarity of life experience.

The three individuals whose profiles of me agreed with my self profile are within five years of age of each other and of me. All three are colleagues who are engaged in daily interactions with one another, with me and with middle school students. Our temperaments are fairly different and, because of these differences, we have worked very hard to establish close working relationships as we have been part of a teaching team for several years.

With regard to my profile of each participant's personality compared to their self profile, I was either on target or very close in each case. These results were encouraging, and I have interpreted my success in profiling others as an indication that I was well on my way to learning how to identify the needs of others and at least aware of the need to be socially intelligent. The malleability of personality is such that our tendencies are readily swayed depending upon circumstance. A successful leader and, especially a group facilitator, must be self-aware to the degree that her personality and communication style may be adapted given the situation and the individuals involved. Reviewing and reflecting upon these personality surveys provided the self-knowledge I need to become a better facilitator of curriculum groups and was a starting point for further self-discovery.

### Communications Style Inventory

Another skill I wanted to develop as a facilitator in a public school district was to understand personality from an additional perspective – communication style. The data collected as a result of the Communication Style Inventory, shown in Table 2 (below), illustrate a greater propensity for the educators I work with to classify themselves as promoter/socializer than any other style. There were approximately twice as many members of this group than belonging to the supporter/relater group (46% - 55% of the total number of participants in each group) and three to six times more than in either the analyzer/thinker or the controller/director groups (9% - 15% of the total number of participants in each group). In my reading about communications style, these results are not unexpected. Both the controller/director and the analyzer/thinker are more extreme styles of communication and are at opposite ends of the communications style continuum with the controller/director at the “externalizing” end of the continuum and the analyzer/thinker at the “internalizing” end (Ruben, 2003). Analysis of the communications style inventory results helped me recognize that there was a diverse population within each of the groups that would require careful observation and guidance in order to maintain equitable participation within the group. I also needed to consider that in both the Science CLT and the Lead Teacher groups there was one individual, in addition to me,

that considered themselves to be a controller/director. The presence of another strong communicator with direct, guarded tendencies also meant I would need to be prepared to acknowledge their strength and work to remain fairly neutral as a facilitator while guiding the group's work.

In my work with the Social Studies CLT one member commented that participation in the Communication Styles Inventory allowed them to really begin to appreciate the individual contributions of group members and remember that everyone offers themselves in a different manner and at different times (Professional Journal, entry 7). This appreciation, echoed by several members of the group, illustrates the effectiveness of the tool for the group as they begin a three-year experience in the curriculum process and validates the usefulness of this type of tool with a group in the "forming" stages of group development.

Table 2. Communications Style Inventory

	<b>Supporter/ Relater</b>	<b>Analyzer/ Thinker</b>	<b>Promoter/ Socializer</b>	<b>Controller/ Director</b>
<b>Lead Teachers</b>	3 (23%)	2 (15%)	6 (46%)	2 (15%)
<b>Science CLT</b>	4 (24%)	2 (12%)	9 (52%)	2 (12%)
<b>Social Studies CLT</b>	3 (27%)	1 (9%)	6 (55%)	1 (9%)

### Critical Friends Oral Feedback

The summary of oral responses from my Critical Friends group

represents feedback from five individuals - three women and two men. I maintained the anonymity of their feedback in order to solicit honest commentary from each group member and to ensure that the information gleaned from their comments would be used for the sole purpose of this project. The comments are listed in the order in which they were received, beginning in March, 2006. The information obtained as a result of the oral feedback has been inherently helpful in my journey of self-discovery. Like the feedback from the interviews, this form of qualitative data collection helped me to triangulate with the quantitative data and provide a more complete picture of my progress as a group facilitator. As stated previously, group facilitation is a complex, multi-faceted task that requires self-awareness in addition to group awareness. This qualitative information verified some of the numeric data, indicating continued need in some areas and progress in others. Overall, when I analyzed the comments, several themes emerged. One theme was the rate and energy of my communication which was exemplified by the quote "You are a better listener now than you were when you began in March. You have learned to slow down, carefully listen and respond in a positive manner" (Critical Friends Oral Feedback, item 3). This feedback occurred fairly early in my research and validated my efforts toward modulating my energy level and my demeanor as a given situation demanded. I was encouraged by this feedback as it indicated progress toward my goal of effective facilitation. Another example of useful feedback is item seven: "You continue to

make progress. Your voice was noticeably softer in this meeting and was very effective.” This statement was particularly useful as I have been told for most of my adult life that I have an assertive demeanor that is amplified by a commanding tone of voice. While this trait is often highly effective when working in a health enhancement classroom or commanding the attention of rowdy teenagers, it is intimidating to some adults and creates an unnecessary barrier to effective communication. I had been working on tone of voice and amplification in the weeks prior to receiving this comment and was again reassured that my efforts were recognizable in my work as group facilitator. Bob Chadwick of Consensus Associates reminds facilitators that their role is to “help the group express their feelings, not tell the group” (p. 1). By softening my voice I am relaying a clear message that I am facilitating, not telling the group what to do.

The second theme was the management aspect of my work as a facilitator. The following quote demonstrated the progress I was making toward communicating clearly and being self-aware of my own needs. “You handled the meeting very well. Your admission of needing to be in control when you are expected to shoulder the responsibility for ensuring things are done was a nice way to help people understand where you’re coming from” (Critical Friends Oral Feedback, item 9). This quote validated the progress I felt I was making and verified that my developing self-awareness was accurate and effective. Overall, the members of my Critical Friends were forthright in their oral feedback and I

found it to be very helpful, although sometimes difficult to hear.

### Critical Friends Survey

The Critical Friends Survey, administered to five individuals including one school principal, two teachers, a university professor, and an assistant superintendent, was designed to solicit written feedback that would clarify and extend information collected via oral feedback and validate or refute my self-perception regarding the effectiveness of my communication style in several different situations. The data (see Table 3) have been expressed as percentages in order to more effectively evaluate the distribution of responses. The row labeled "Listens to concerns" has not been presented as percentages as respondents were asked to mark all that apply, invalidating the usefulness of percentage distributions. Analysis of the data indicate I am most effective in a one-on-one setting and least effective in a large group setting, although there were no responses in either the "not very effective" or "ineffective" columns. Many years as a classroom teacher and health enhancement teacher have resulted in some entrenched behaviors, especially in a large group setting. A teacher accustomed to working with large groups in noisy settings is necessarily commanding, a trait that seems to be quite common in those individuals with director/controller communication style tendencies. Examination of responses from my critical friends indicates the need for continued work in the area of large

group communication.

**Table 3. Critical Friends Survey Responses, questions 1 – 7 and 9**

	Highly Effective	Somewhat Effective	Not Very Effective	Ineffective	
<i>Communication Style, one-on-one</i>	100%	0	0	0	
<i>Communication Style, small group</i>	80%	20%	0	0	
<i>Communication Style, large group</i>	60%	40%	0	0	
<i>Tone of voice, one-on-one</i>	100%	0	0	0	
<i>Tone of voice, small group</i>	80%	20%	0	0	
<i>Tone of voice, large group</i>	80%	20%	0	0	
					Few Interruptions
<i>Listens to concerns (mark all that apply)</i>	2	2	1	5	3
	Clearly Understands	Some Understanding	Limited Understanding		
<i>Manner of response</i>	80%	20%	0		

Realizing that open-ended responses often supply additional information that may not be gleaned from selected response questions, the open response section was included. The comments summarized in Table 4 (below) encompass all comments written by respondents. When the comment appeared on more than one response sheet, the number of times it was included has been indicated by a number in parentheses following the comment. These comments regarding body language, an important aspect of effective communication, validate my self-

perception and indicate that my body language is effective in communicating interest in others.

Table 4. Critical Friends Survey Responses, question 8

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Summary of open-ended responses

"Describe the body language of the subject in the following situations."

<i>Body Language, casual</i>	attentive, friendly (2), caring, leaning toward person, eye contact (3), appropriate, uses humor
<i>Body Language, important issue</i>	engaged (2), professional, interested, somewhat on alert, good eye contact, on-task, appropriate, inquisitive, attentive engaged, professional, interested, somewhat on alert, eye contact,
<i>Body Language, unfamiliar</i>	concern through talk and action, highly motivated

Facilitator Effectiveness Survey

The "Facilitator Effectiveness 2006" online survey results from November, 2006 (Table 5 and Appendix G) represent responses from fourteen members of the Math CLT. The survey was anonymous so it is not known which four members of the group did not respond nor the gender of those responding. Analysis of the responses indicated that, although the majority of team members felt I was exhibiting the characteristics of a good facilitator such as active listening and providing beneficial feedback, approximately one-third of the participants did not feel I had listened carefully nor responded appropriately. These responses caused my heart to sink and prompted me to explore another means to ascertain the reasons behind the responses. I shared the data with a member of my critical friends group who suggested I call a sampling of

elementary, middle school and high school team members and ask each individual for a response to the question “*What have you observed during your interactions with me as a facilitator that would help me understand what I am doing well and which areas I need to focus upon?*” With the help of my critical friend, eleven Math CLT members were contacted. Every individual asked to participate in the interview was very compliant and willing to provide honest commentary that provided a great deal of illumination in the area of my communication skills specifically and my facilitation skills in general. One comment in particular, comment three, gave me pause to reflect and consider the rate of my communication in addition to the tone, volume and voice inflection. “Sometimes your answers are a little abrupt and too quick. You need to listen to what we have to say even when you disagree.” Another individual stated “I know you well and do not take offense when you make strong statements; however, at our last meeting I felt shut down when you told us how we would be proceeding rather than explaining the rationale and asking for input” (Participant Interviews, Comment 10). In this situation I was not utilizing my understanding of social intelligence in my role as facilitator and not acting in a manner commensurate with transitional leadership, instead falling back into old habits of authoritarian leadership that were in direct opposition to the move I was attempting to make toward effective communication and group facilitation. Goleman (2006) refers to our ability to sense another’s inner state as “social awareness”. I had no idea

either of these individuals were affected in this manner by my actions, perhaps because I was “in the box” as a result of the authoritarian manner I was using (Arbinger Institute, 2002). In order to proceed further in my quest toward effective group facilitation I realized that I needed to work on both my social awareness and my social facility, the ability to build on social awareness. For the next two months I continued to read, reflect and be conscious of my actions as a complete package, including purposeful, carefully considered communications at all times. The progress achieved during this time period is reflected in the following data analysis conducted following the three Facilitator Effectiveness Surveys in 2006 and 2007.

**Table 5. Facilitator Effectiveness Survey Results, November 2006**

	Strongly Agree	Agree	Disagree	Strongly Disagree	Response Total
Listens carefully	21%	64%	9%	9%	14
Responds appropriately & respectfully	29%	50%	14%	9%	14
Encourages active participation	21%	64%	14%	0	14
Approachable	21%	64%	14%	0	14
Provides beneficial feedback	29%	36%	36%	0	14
Participation enhanced	21%	43%	29%	9%	14

In January, 2007 a similar survey, Facilitator Effectiveness Survey, January 2007, was taken by sixteen members of the Science and Social Studies CLTs. Three weeks later eight members of the Indian Education Lead Teacher group took the Facilitator Effectiveness Survey, February, 2007 with very similar

results. These two surveys were given approximately nine weeks after the initial survey and, although the surveys differ slightly, the results indicate growth in the area of group facilitation with an increasing facility for active listening, responding effectively, encouraging active participation, being approachable, and providing beneficial feedback. Analysis of the November, 2006 and January, 2007 data indicate a nine percent increase in respondents who agreed or strongly agreed that I listen carefully, respond appropriately and encourage active participation. I experienced a three percent increase in respondents who felt I was approachable and a twenty-two percent increase in my ability to provide beneficial feedback. Further comparative analysis of the November, 2006 data and the February, 2007 data are even more encouraging as three of the four questions scored 100% agree and strongly agree.

**Table 6. Facilitator Effectiveness Survey Results, January 2007**

	Strongly Agree	Agree	Disagree	Strongly Disagree	Response Total
Listens carefully	53%	41%	0	6%	17
Responds appropriately & respectfully.	65%	23%	6%	6%	17
Encourage active participation.	47%	47%	0	6%	17
Approachable	59%	29%	6%	6%	17
Provides beneficial feedback.	56%	31%	13%	0	16
I feel included & respected.	59%	29%	12%	0	17
Asks reflective questions.	38%	56%	0	6%	16
Body language indicates interest.	38%	50%	0	6%	16
All members encouraged.	56%	38%	0	6%	16
Plan for each meeting, keep group on track.	63%	37%	0	0	16

Table 7. Facilitator Effectiveness Results, February 2007

	Strongly Agree	Agree	Disagree	Strongly Disagree	Response Total
Listens carefully	50%	50%	0	0	8
Responds appropriately & respectfully.	50%	50%	0	0	8
Encourage active participation.	75%	25%	0	0	8
Approachable	50%	50%	0	0	8
Provides beneficial feedback.	63%	37%	0	0	8
I feel included & respected.	75%	25%	0	0	8
Asks reflective questions.	0	100%	0	0	8
Body language indicates interest.	38%	62%	0	0	8
All members encouraged.	62%	38%	0	0	8
Plan for each meeting, keep group on track.	0	88%	0	12%	8

Table 8. Facilitator Effectiveness Survey Comparison

	Combined Responses Strongly Agree/ Agree		
	<i>Nov-06</i>	<i>Jan-07</i>	<i>Feb-07</i>
Listens carefully	30%	94%	100%
Responses	36%	88%	100%
Encourages active participation	30%	94%	100%
Approachable	30%	88%	100%
Provides beneficial feedback	34%	87%	100%

While these data suggest improvement, I have considered the possibility that this could also be explained by the difference in group membership and their individual perceptions. As discussed previously, personality predisposition as

well as an individual's status with regard to Maslow's Hierarchy of Needs and Hall & Hord's adopter categories could have influenced these data. In addition, the results may have been affected by several variables including the fact that there are three individuals who may have taken the survey twice – each one is a member of two different survey groups and was not eliminated from subsequent surveys. One is a member of the Math CLT as well as the Science/Social Studies CLT survey group and two individuals belong to both the Social Studies CLT and the Indian Education group. In addition, I changed some of the questions in the second section of the survey; for this reason, the second section of the survey was not analyzed for the purposes of this study.

### Participant Interviews

Although I continue to work on improving both my skills in the area of group facilitation and moderating my style of communication, I have achieved growth as previously demonstrated through examination of the Facilitator Effectiveness Survey and Critical Friends feedback. Due to the fact that the participant interviews were designed as a tool to clarify responses from members of the participant groups, much of the feedback does focus upon areas of concern. The first group to be interviewed in December, 2006 indicated that my confident manner could be misconstrued as abrupt (Participant Interviews, Item 3). Follow-up discussion with two members of the Social Studies/Science CLT

and Indian Education group in February, 2007 once again revealed instances in which my response carried a brusque tone or the nature of my response was heavily opinionated rather than open and receptive. An example of this concern is clearly articulated in Appendix I, comment 11: "I tend not to say very much as generally a time arises when the issue may be addressed, but I think the difference in power between your position and mine makes it more difficult for me to say much when I am concerned." The individual who made this statement is a self-described introvert and an Analyzer/Thinker according to her Communications Style Inventory. She is very sensitive to power status and therefore a good barometer for me. This problem in communication is referred to by The Arbinger Institute (2002) as being "in the box" and therefore isolating oneself from the empathetic responses characterized by deep listening. A response of this nature can cause the recipient to also enter the box and effectively restrict successful communication. In order to avoid this dilemma in communication it is important that I practice social intelligence, especially in the area of social cognition. Social cognition is an aspect of interpersonal awareness identified by Goleman (2006) as the ability to understand how the "subtle, shifting currents" of the social world work (p. 90).

The last entry in this section, Item 12, indicates that I am listening to participants' concerns and willing to make changes in the plan when it becomes clear that change is needed. Movement toward social cognition has been long

overdue and increasingly necessary as I continue to work as a group facilitator.

### Spontaneous Feedback

Spontaneous feedback from individuals was not an original part of my action research data collection plan; however, possibly due to my full disclosure with regard to my action research, several people shared unsolicited feedback with me at various points during the study. The feedback provided was valuable in that it helped me realize the true value of being organized, and listening to not only what is said, but what is not said. “Thanks for listening to me complain, well really not complain, express my concerns. I appreciate that you’re willing to listen and keep going back to discuss my concerns” (Spontaneous Feedback, entry 4). This statement, made without pretense or motive, is illustrative of the importance of deep listening and reinforces the idea that an effective educational leader as well as an effective facilitator listens actively and completely. This is one area in which I have developed strength and patience. Inclusion of unsolicited comments, when compared with other data collection, provided yet another lens through which I was able to examine my progress in the area of facilitation.

### Professional Journal

My professional journal, maintained sporadically over the 12 months that my action research encompassed, reflects my thoughts, concerns and

celebrations throughout the self-study. The following entry, recorded after a meeting for which I was poorly prepared, reiterate the proposition, established by multiple sources, that an effective group facilitator must be organized.

I recently facilitated a meeting in which I had not planned an agenda due to some other events that had consumed my time. Although the meeting moved right along and minutes were recorded, a set agenda may have helped produce an even better sense of purpose of group involvement. The group participated well, and much was accomplished, but I keep asking myself how much more effective it may have been if I had been better prepared. (Professional Journal, entry 2)

Since this experience I have not entered another meeting without having a clear sense of purpose and an agenda that clearly describes that purpose. Another example of the validation provided by my journal is as follows:

I am very troubled as the results of the survey indicate that one member of the math CLT feels I am “rude” and another states that I need to provide greater direction earlier in the meeting with work completed in a format fairly different than what I am currently using. Several members feel they do not benefit from me as a facilitator. I have been working so hard to create a respectful atmosphere and respond kindly, but directly to individuals – this feels very negative and is a blow to my self-perception. (Professional Journal, entry 9)

These thoughts led to the interview aspect of my data collection and began an earnest period of self-reflection and discussion with critical friends. This journal entry and the subsequent action was a turning point in my action research, leading me to finally begin making some clear connections between the literature review I had been conducting, the data that had been collected and recognition of the dilemma between being focused, on-task, purposeful, and communicating

effectively and being socially intelligent within the parameters of personality tendencies entrenched by habit and genetic predisposition.

## CHAPTER FIVE

### DISCUSSION

Becoming an effective group facilitator is important to me for several reasons. As a group member I have often been frustrated by the lack of preparedness of the facilitator and the insensitivity to members' needs indicated by the demeanor and unresponsive nature of the facilitator's replies to questions, concerns and requests. This includes seemingly trivial components such as bathroom breaks, availability of snacks and beverages for extended meetings, as well as the tone of voice used by the facilitator. Effective facilitation goes beyond the meeting itself and into the communication style and timeliness of response as well as the willingness of the facilitator to take risks in the manner of response.

A second value claim involves members of the Lead Teacher group who stated they enjoyed taking the inventory a second time to confirm (or refute) their results from the first inventory. This was a self-affirming experience as I was very concerned about the group understanding and appreciating the personal value of the tool for their own self-realization and growth and not just for me in my quest toward becoming an effective facilitator. The fact that participants valued the communications style inventory also confirmed that I had chosen wisely and appropriately explained its use and usefulness to the group.

As I continue to mull over the value of my project and its impact on me, I realize that I have been a reflective practitioner since the earliest years of my teaching career. The difference between then and now is the fact that action research, as a formalized study, has forced me to think about WHY I act in a particular manner as well as seek research and conversation with others to develop understanding on a deeper level. This deeper level of reflection means I am likely to sustain the changes I seek in myself and understand not just myself more clearly, but other people. This alone makes the research worthwhile. But perhaps of greatest value to me has been in the collegial relationships that have been fostered as a result of my willingness to disclose a desire to improve and my increasing ability to carefully listen to other people's concerns and respond appropriately.

Throughout this action research I have been compelled to examine my own values in terms of what I expect from myself and what I expect from others. I hold myself to a very high standard and tend to be critical of both my own efforts and, at times, the efforts of others. By examining my abilities as a facilitator and comparing my opinions to those of the group members I am working with as well as my critical friends through oral and written feedback, I have a more realistic view of my strengths in the area of group facilitation and have identified areas in which continued work is necessary.

Over the course of this action research project I have had the

opportunity to systematically inquire into the state and conscious growth of my group facilitation skills. Through the analysis of multiple data methods including the Facilitator Effectiveness Survey, Critical Friends Oral Feedback and Survey, Participant Interviews and my professional journal, I have supported my claim that practicing the techniques learned in consensus training, implementing strategies that are the basis for social intelligence theory and personality theory, and practicing self-reflection, resulted in an increased level of effectiveness in the area of communication which has improved my work in group facilitation.

Feedback from the Facilitator Effectiveness surveys conducted in November, 2006; January, 2007 and February, 2007 indicates there are still some individuals whose needs I have been unable to meet and for whom my communication style remains unapproachable. Comparing this feedback to both individual interviews with group members and written comments from my critical friends, I have identified a need to continue to work on hearing what people say and how it is said in order to understand what is needed and respond appropriately. Both sources also indicated my strong, direct style of communication with a large group may sometimes be misinterpreted as controlling and directive. The following quote, shared during one of the participant interviews in January, 2007, captures this issue very clearly.

You have a confident manner of speaking, but sometimes it may be misconstrued as being authoritative and too strong. You may think about using phrases such as “did I hear you correctly?” to clarify without

overstepping boundaries. (Participant Interview, 3)

Goleman (2006) discusses the concept of “attunement” as attention that moves beyond temporary empathy to a “full, sustained presence that facilitates rapport” (p. 86). In other words the facilitator who is capable of reaching others on a deeper level, eliciting their interest in listening, will be more effective than an individual who is directive and talking at individuals. He goes further to distinguish between interactions referred to by the philosopher Martin Buber as “I-It” and “I-You” in which the exchange is either cold and impersonal or empathetic and personal, respectively. The ability to recognize this important distinction could significantly affect an individual’s perception of the facilitator and therefore also impact effectiveness. In working to make this distinction and moderate my communication to be contextually appropriate and meet individual needs, I am becoming more socially intelligent. This is apparent in comment 10 of my Critical Friends Oral Feedback: “I like how you handled many people wanting to share their thoughts. Saying their name(s) and acknowledging they had something to say kept things moving and let people know they would be heard.” The contrast between this comment and earlier comments when coupled with the results from the Facilitator Effectiveness Surveys is a good indication that I have made progress toward becoming an effective group facilitator.

Feedback from critical friends indicated that my facilitation style, including my level of organization and ability to hear the individual group members and

honor each individual's contribution, is “commendable and effective” (Critical Friends Oral Feedback, 2). They also indicate that I am improving in my ability to listen to an individual completely and with little interruption. According to their feedback, my individual and small group communication remains somewhat more effective than my large group skills. The validation I have received from members of my critical friends group indicates that I have been as effective as I had hoped in some situations and that my critical self-analysis has been warranted in others. Based on my experience thus far, the feedback I have received is slightly more positive than the self-reflection I have conducted following each meeting.

I have been facilitating a number of groups in a variety of contexts and my success varies with the context and the group. For example, in the initial survey conducted with the Math CLT (November, 2006) I received several responses (3 responses or 23%) that indicated I did not respond appropriately and two (18%) who felt I did not listen carefully. This caught me by surprise and was cause for a great deal of initial dismay. Further reflection and inquiry revealed that people had been as honest and forthright as I had requested in the survey and that a gap existed between my self-perception and the perceptions of some group members. This feedback was a turning point in my research, providing me with a foundation for reflection and substantial growth. Subsequent surveys conducted in January, 2007 and February, 2007 were very positive with one outlier in each

group who was very dissatisfied with my work as facilitator. This could be an individual with whom I have had repeated polite conflict who is also a member of the Math CLT surveyed in November, 2006 and quite critical of my efforts, possibly due to a fundamental difference in philosophy unrelated to my actual facilitation of the groups.

Through the process of self-reflection I have begun to realize how much more effective I feel when I have had adequate time to prepare and have considered variables such as time, meeting place, and meeting conditions that are inherent in every situation. Feedback from critical friends, participant interviews and spontaneous feedback concurs with this opinion. Although this is seemingly a minor aspect of facilitation, the initial impression created by the facilitator's level of organization and subsequent demeanor can significantly impact the outcome and must be carefully considered.

As a result of this action research project I have developed an emerging understanding of the incredible complexity of leadership in general and group facilitation in particular. My ability to develop into an effective facilitator has been both hindered and helped by my personality tendencies to be strong, self-sufficient and driven to achieve. My communication style, controller/director with promoter/socializer tendencies, mirrors many aspects of my assertive, dynamic personality. Two strengths of my nascent facilitation style, organization and focus, can also act as barriers to building relationships. When tempered with

promoter/socializer tendencies and related concern for others' needs as well as time for observation, reflection and emerging social intelligence, these characteristics provide a foundation for continued improvement in the areas of facilitation and educational leadership.

"The self is our life's goal,  
for it is the completest expression of that fateful combination  
we call individuality." -Carl Jung

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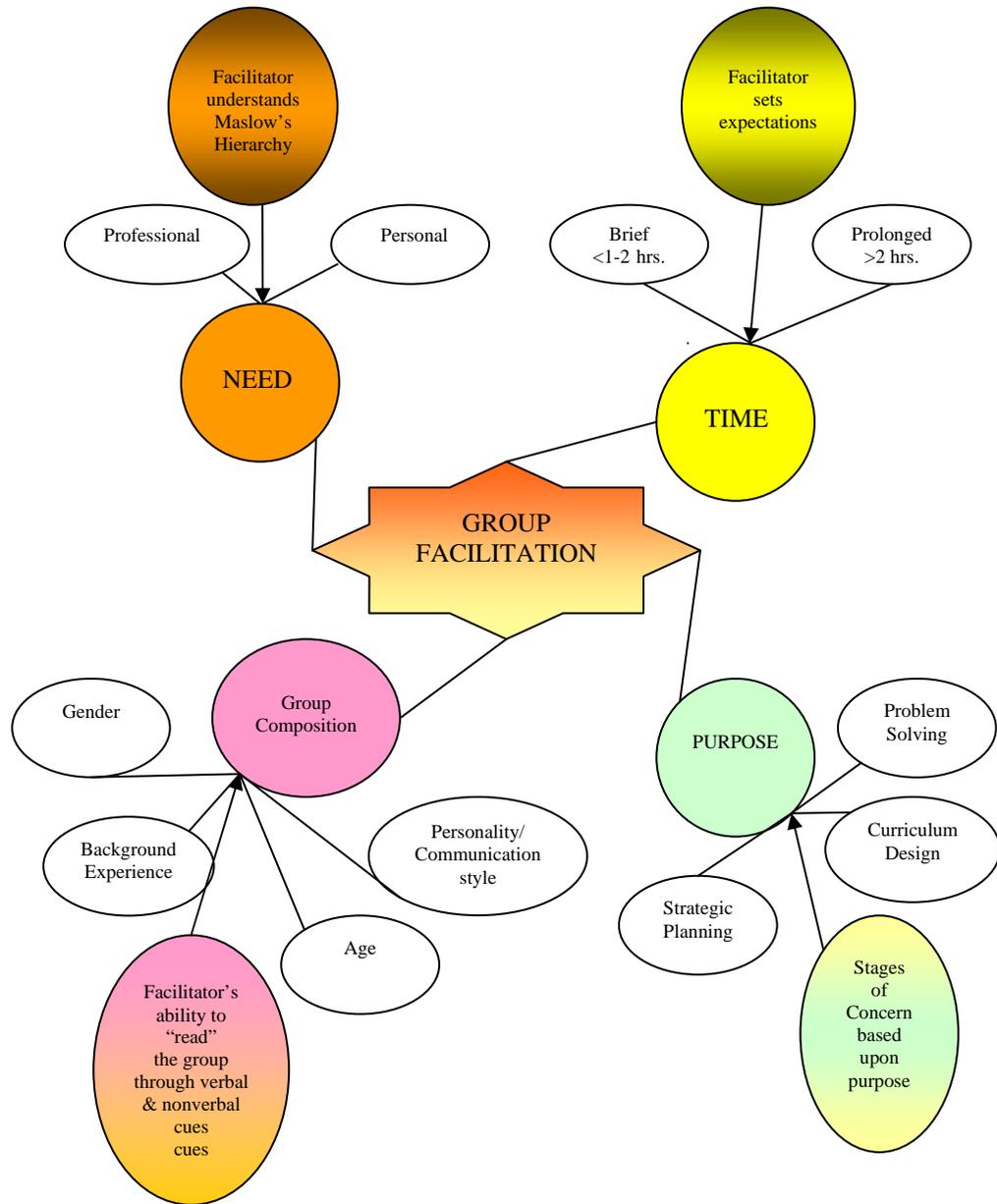
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APPENDICES

APPENDIX A

GROUP FACILITATION CONCEPT WEB

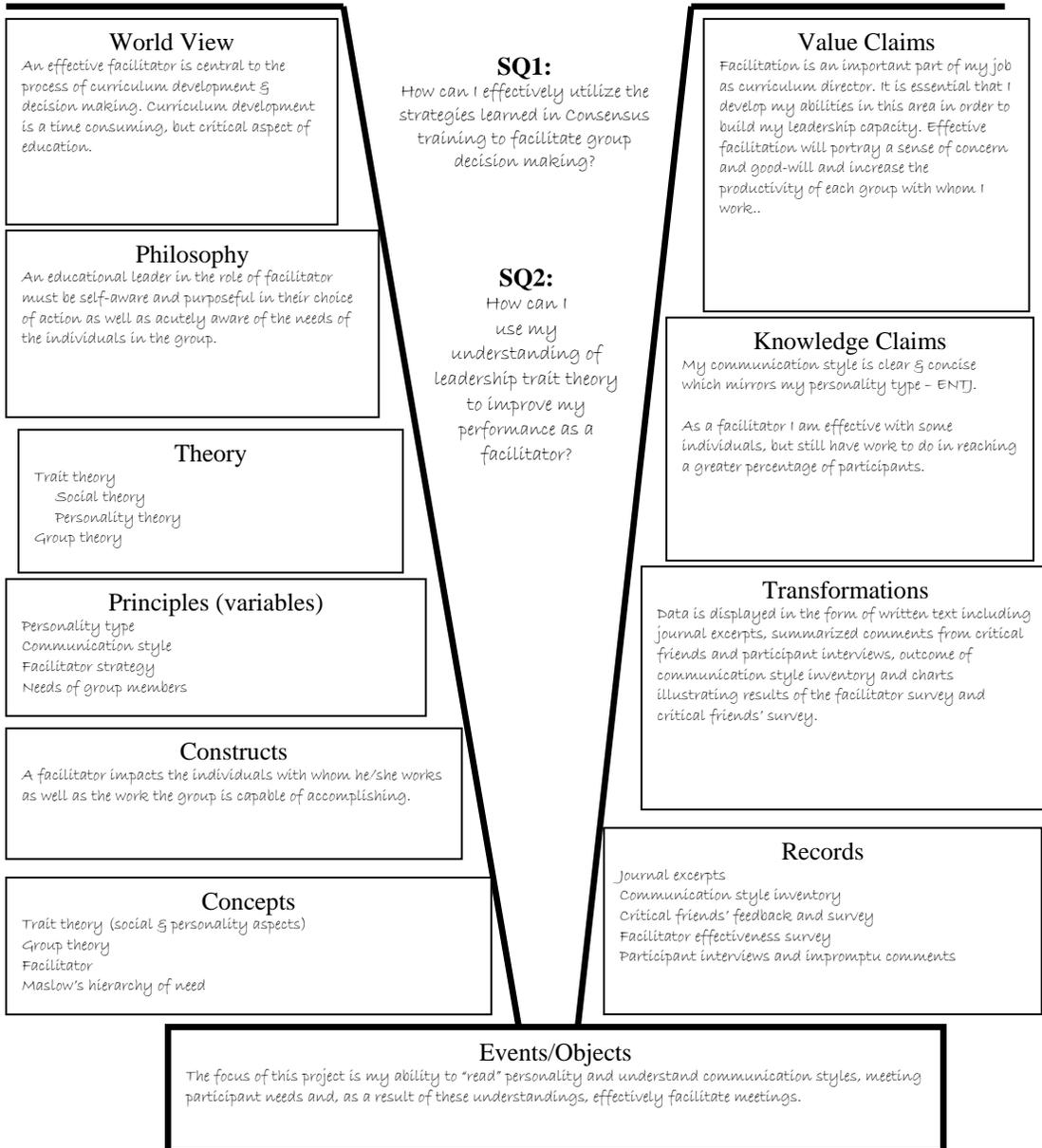


APPENDIX B  
VEE DIAGRAM

**Conceptual/  
Theoretical**

**Focus Question:**  
How can I become a more effective group facilitator?

**Methodological**



APPENDIX C

MYERS-BRIGGS TYPE INDICATOR

April 4, 2006

Dear Critical Friend,

Thank you for your willingness to participate in my pilot action research study. As you know from reading the abstract of my project, I am examining my own ability to “read” an individual’s personality type through variations of the Jung Typology and Myers-Briggs Type Indicator as well as better understand my own personality. Through this self-exploration I hope to develop my ability to perceive the needs of others and moderate my own behavior to meet those needs, creating a collegial environment for work. This is a pilot study used to practice the concept of action research and refine the stated focus question for further examination in the actual action research study conducted during fall 2006. Names will remain confidential, and will be omitted from the final report. Personality type reporting will be discussed only as necessary to validate my opinions. The report of findings will be available upon request in May 2006.

Please feel free to contact me should you have questions or concerns regarding this study, results reporting or completion of the personality quiz.

Sincerely,

Robin Arnold

Instructions for completing quiz:

1. Log on to <http://www.personalitytype.com>
2. Read “Instructions” and complete quiz as directed for your own personality.
3. Once you have made selections for each of the four categories, click “Discover Your Type”.
4. Print the page titled “Life As An \_\_\_\_\_”
5. Repeat steps 1-4 using your perception of my personality characteristics.
6. Send both sets of results to me at Willson, Attn: Robin Arnold.

Table 9. The 16 Learning Styles and Personality Assessment, Results of the Myers-Briggs Type Indicator

	Sensing Types		Intuitive Types	
<b>Introverts</b>	<u>ISTJ</u> REA (RA) EZ (RA, self)	<u>ISFJ</u> RA (WA)	<u>INFJ</u> DM (self/RA)	<u>INTJ</u> DB (RA/self) MK (RA) REA (self)
<b>Introverts</b>	<u>ISTP</u>	<u>ISFP</u> WA (RA)	<u>INFP</u>	<u>INTP</u>
<b>Extroverts</b>	<u>ESTP</u> WA (self)	<u>ESFP</u>	<u>ENFP</u> BS (RA)	<u>ENTP</u>
<b>Extroverts</b>	<u>ESTJ</u>	<u>ESFJ</u> RA (DM & REA)	<u>ENFJ</u> MK (self)	<u>ENTJ</u> RA (self/DB/ MK/EZ)

Adapted by Robin Arnold from I. Briggs-Myers & M. McCaulley (1992) *Manual: a Guide to the Development and Use of the Myers-Briggs Type Indicator*. Consulting Psychologists Press

\*The initials in each box refer to the individual being typed. The initials in parentheses indicate the individual(s) performing the typing exercise. Example: In the ESFJ box, RA was typed by DM and REA as an ESFJ.

APPENDIX D

COMMUNICATIONS STYLE INVENTORY

### Communications Style Inventory

This is an informal survey, designed to determine how you usually act in everyday related situations. The idea is to get a clear description of how you see yourself. On the answer sheet, circle A or B in each pair of statements below, which shows the one that MOST, describes you.

1. A) I'm usually open to getting to know people personally and establishing relationships with them.  
B) I'm not usually open to getting to know people personally and establishing relationships with them.
2. A) I usually react slowly and deliberately.  
B) I usually react quickly and spontaneously.
3. A) I'm usually guarded about other people's use of my time.  
B) I'm usually open to other people's use of my time.
4. A) I usually introduce myself at social gatherings.  
B) I usually wait for others to introduce themselves to me at social gatherings.
5. A) I usually focus my conversations on the interests of the people involved, even if that means straying from the business or subject at hand.  
B) I usually focus my conversations on the tasks, issues, business, or subject at hand.
6. A) I'm usually not assertive, and I can be patient with a slow pace.  
B) I'm usually assertive, and at times I can be impatient with a slow pace.
7. A) I usually make decisions based on facts or evidence.  
B) I usually make decisions based on feelings, experiences or relationships.
8. A) I usually contribute frequently to group conversations.  
B) I usually contribute infrequently to group conversations.
9. A) I usually prefer to work with and through others, providing support when possible.  
B) I usually prefer to work independently or dictate the conditions in terms of how others are involved.
10. A) I usually ask questions or speak tentatively and indirectly.  
B) I usually make empathic statements or directly expressed opinions.

11. A) I usually focus primarily on ideas, concepts, or results.  
B) I usually focus primarily on persons, interactions, and feelings.
12. A) I usually use gestures, facial expression, and voice intonations to emphasize points.  
B) I usually do not use gestures, facial expressions, and voice intonations to emphasize points.
13. A) I usually accept others' points of view (ideas, feelings, and concerns).  
B) I usually don't accept others' points of view (ideas, feelings, and concerns).
14. A) I usually respond to risk and change in a cautious or predictable manner.  
B) I usually respond to risk and change in dynamic or unpredictable manner.
15. A) I usually prefer to keep personal feelings and thoughts private, sharing only when I wish to do to.  
B) I usually find it natural and easy to share and discuss my feelings with others.
16. A) I usually seek out new or different experiences and situations.  
B) I usually choose known or similar situations and relationships.
17. A) I'm usually responsive to others' agendas, interests, and concerns.  
B) I'm usually directed toward my own agendas, interests and concerns.
18. A) I usually respond to conflict slowly and indirectly.  
B) I usually respond to conflict quickly and directly.

**ANSWER SHEET**

<b>O</b>	<b>G</b>	<b>D</b>	<b>I</b>
1A	1B	2B	2A
3B	3A	4A	4B
5A	5B	6B	6A
7B	7A	8A	8B
9A	9B	10B	10A
11B	11A	12A	12B
13A	13B	14B	14A
15B	15A	16A	16B
17A	17B	18B	18A

TOTALS      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_      \_\_\_\_\_

Total the numbers of items circled in each column and write it on the spaces above.

Now, compare the “O” column with the “G” column and circle the letter that has the highest total.

O or G

Then compare the “D” column with the “I” column and circle the letter that has the highest total.

D or I

**So What’s the Verdict????**

If you circled the G and D, you tend toward being a Controller/Director.

If you circled the O and D, you show many qualities of a Promoter/Socializer.

If you circled the O and I, you’re predominantly a Supporter/Relater.

If you circled the G and I, you have lots of Analyzer/Thinker characteristics.

**SUPPORTER/RELATER**

- Harmonizer
- Values acceptance and stability in circumstances
- Slow with big decisions; dislikes change
- Builds networks of friends to help do work
- Good listener; timid about voicing contrary opinions; concerned for others' feelings
- Easy-going; likes slow, steady pace
- Friendly & sensitive; no person in unlovable
- Relationship Oriented

**ANALYZER/THINKER**

- Assessor
- Values accuracy in details & being right
- Plans thoroughly before deciding to act
- Prefers to work alone
- Introverted; quick to think and slow to speak; closed about personal matters
- Highly organized; even plans spontaneity!
- Cautious, logical, thrifty approach
- Thoughtful; no problem is too big to ponder
- Idea Oriented

**PROMOTER/SOCIALIZER**

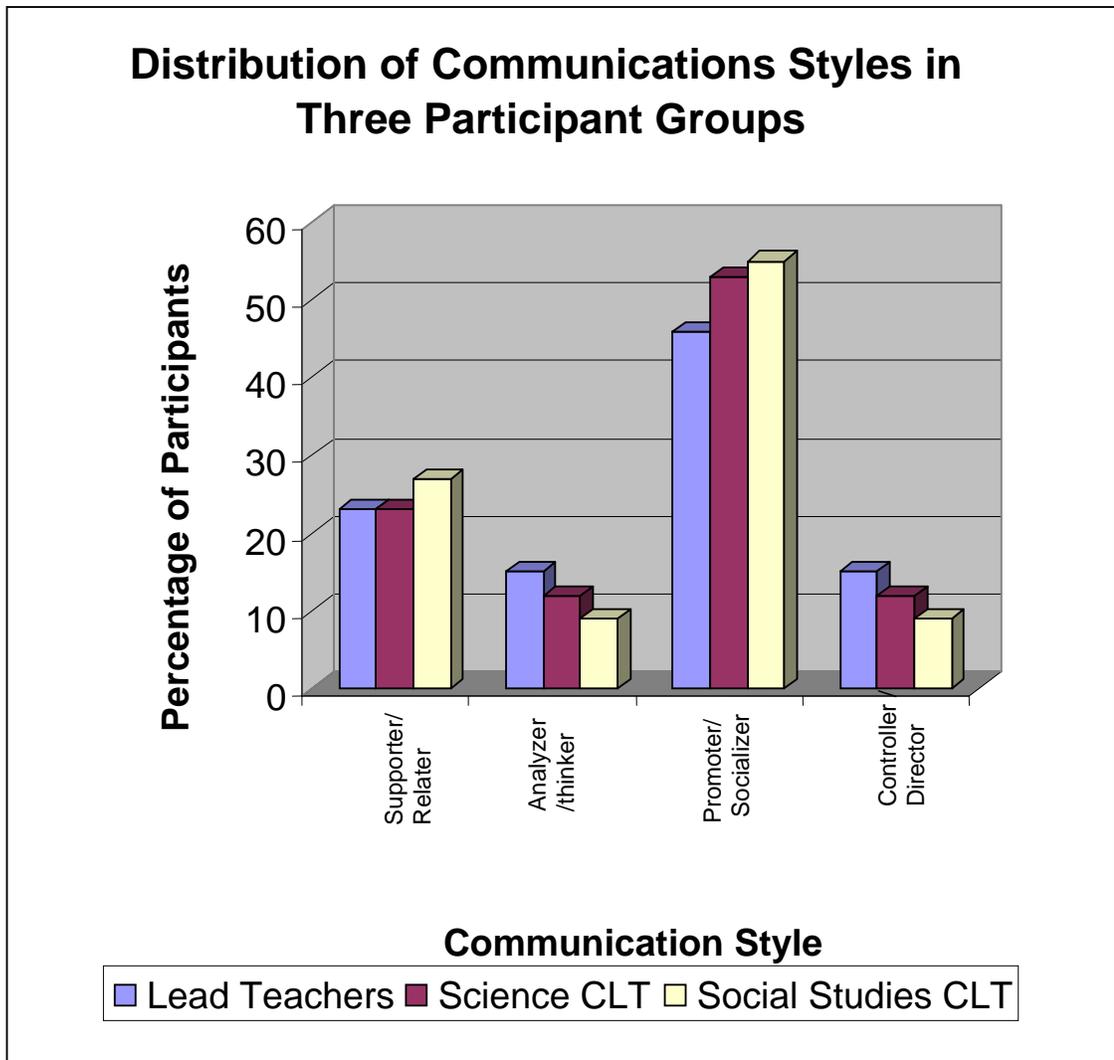
- Entertainer
- Values enjoyment and helping others with the same
- Full of ideas and impulsive in trying them
- Wants to work to be fun for everyone
- Talkative and open about self; asks others' opinions; loves to brainstorm
- Flexible; easily bored with routine
- Intuitive, creative, spontaneous, flamboyant approach
- Optimist; nothing is beyond hope
- Celebration Oriented

**CONTROLLER/DIRECTOR**

- Commander
- Values getting the job done
- Decisive risk taker
- Good at delegating work to others
- Not shy but private about personal matters; comes on strong in conversation
- Likes to be where the action is
- Take charge, enterprising, competitive, efficient approach
- Fearless; no obstacle is too big to tackle
- Results Oriented

Table 10. Number and Percentage of Individuals by Category

	<b>Supporter/ Relater</b>	<b>Analyzer/ Thinker</b>	<b>Promoter/ Socializer</b>	<b>Controller/ Director</b>
<b>Lead Teachers</b>	3 (23%)	2 (15%)	6 (46%)	2 (15%)
<b>Science CLT</b>	4 (23%)	2 (12%)	9 (53%)	2 (12%)
<b>Social Studies CLT</b>	3 (27%)	1 (9%)	6 (55%)	1 (9%)



APPENDIX E

Critical Friends Oral Feedback

- 1) I like your take on that, Robin. Being an effective facilitator is such a critical role for any kind of positive change. Facilitating a meeting is really a balancing act - sometimes a high-wire one when personalities and issues flare up - like they inevitably do at some point. Often times it's simply a matter of setting up a meeting with good energy and establishing an agreeable disposition among the participants. This is truly a "trick of the trade," and one that I've seen you perform in action!
- 2) Facilitation style, including level of organization and ability to hear the individual group members and honor each individual's contribution, is commendable and effective.
- 3) You are a better listener now than you were when you began in March (2006). You have learned to slow down, carefully listen and respond in a positive manner.
- 4) You are very strong, clear and concise. Like me you have to be very careful that your confidence does not overwhelm others. Slow down and remember to reflect upon what a person doesn't say as this is more important than what they do say.
- 5) Excellent job facilitating the health enhancement meeting! You were not intimidated by some strong personalities and did a nice job of creating compromise.
- 6) Phenomenal job at the meeting on Wednesday! You were confident, open, honest and organized. The agenda and handouts were prepared, you weren't rushing around to set up and your thoughts were clear.
- 7) Use the word "and" instead of the word "but", it indicates you have heard the speaker and are offering additional information.
- 8) You continue to make progress. Your voice was noticeably softer in this meeting and was very effective.
- 9) You handled the meeting very well. Your admission of needing to be in control when you are expected to shoulder the responsibility for ensuring things are done was a nice way to help people understand where you're coming from. I also liked your disclaimer about not having as much experience writing the reports, but looking at them through a fresh lens and offering suggestions to each of us.

10) I like how you handled many people wanting to share their thoughts. Saying their name(s) and acknowledging they had something to say kept things moving and let people know they would be heard.

APPENDIX F

CRITICAL FRIEND SURVEY

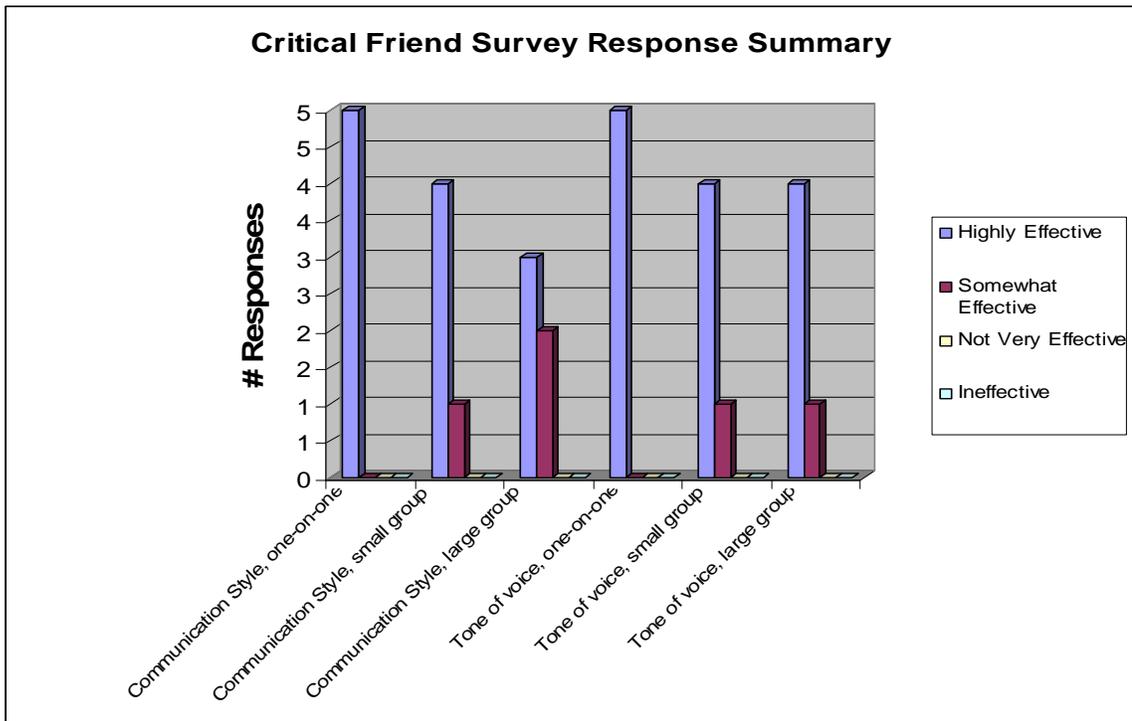
*Please complete the following questions based upon your direct and indirect experience with Robin Arnold. The results of this survey will remain anonymous; however, an analysis of the results will be included in an Action Research paper reflecting upon her communication style and degree of effectiveness as a group facilitator.*

1. In your opinion the communication style of the subject in one-on-one situations is:  
 A) highly effective      B) somewhat effective      C) not very effective      D) ineffective  
 Comments:
  
2. In your opinion the communication style of the subject in small group situations is:  
 A) highly effective      B) somewhat effective      C) not very effective      D) ineffective  
 Comments:
  
3. In your opinion, the communication style of the subject in large group situations is  
 A) highly effective      B) somewhat effective      C) not very effective      D) ineffective  
 Comments:
  
4. In your opinion, the subject's tone of voice in one-on-one situations is  
 A) highly effective      B) somewhat effective      C) not very effective      D) ineffective  
 Comments:
  
5. In your opinion, the subject's tone of voice in small group situations is  
 A) highly effective      B) somewhat effective      C) not very effective      D) ineffective  
 Comments:
  
6. In your opinion, the subject's tone of voice in large group situations is  
 A) highly effective      B) somewhat effective      C) not very effective      D) ineffective  
 Comments:
  
7. The subject listens to others' concerns (check all that apply):  

patiently	with interest	with few interruptions
with anticipation	w/little interest	with some interruptions
with eagerness	w/o interest	with regular interruptions
  
8. The subject responds to me in a manner that indicates she
  - A) clearly understands my needs and responds in a manner that is appropriate for the situation
  - B) has some understanding of my needs and attempts to respond appropriately, but with some difficulty
  - C) has limited understanding of my needs and makes little or no attempt to respond appropriately
  
9. Describe the body language of the subject in each of the following situations:  
 While engaged in casual conversation:  
 While engaged in discussion of an important issue:  
 While in conference w/a parent or other individual outside of daily contact:

Table 11. Critical Friend Survey Response Summary

	<u>Highly Effective</u>	<u>Somewhat Effective</u>	<u>Not Very Effective</u>	<u>Ineffective</u>
<i>Communication Style, one-on-one</i>	5	0	0	0
<i>Communication Style, small group</i>	4	1	0	0
<i>Communication Style, large group</i>	3	2	0	0
<i>Tone of voice, one-on-one</i>	5	0	0	0
<i>Tone of voice, small group</i>	4	1	0	0
<i>Tone of voice, large group</i>	4	1	0	0



APPENDIX G

FACILITATOR EFFECTIVENESS SURVEY, NOVEMBER 2006

Effective facilitation is an important factor in a group's success. In this Section, your feedback on the facilitation skills demonstrated by Robin Arnold is requested.

1. Indicate the degree to which you agree or disagree with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
a. There is adequate opportunity to interact with the facilitator.	<input type="checkbox"/>				
b. The facilitator encourages active participation.	<input type="checkbox"/>				
c. The facilitator is approachable.	<input type="checkbox"/>				
d. The facilitator's feedback is beneficial.	<input type="checkbox"/>				
e. My participation is enhanced through interaction with the facilitator.	<input type="checkbox"/>				

2. Comments:

## Communication

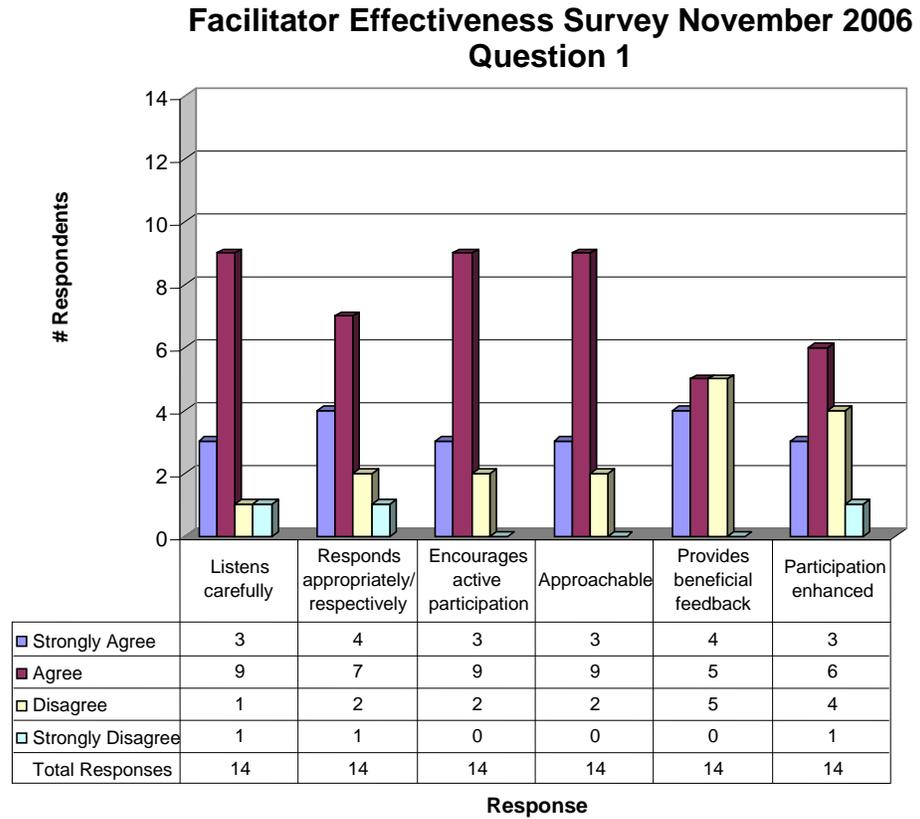
Member-facilitator and member-member interactions enhance group work. Your feedback will provide me with information on how effective these tools are in enabling communication with your facilitator and other members of the CLT.

3. I am satisfied with the use of each of the following:

	Strongly Agree	Agree	Disagree	Strongly Disagree	Not Applicable
a. Telephone	<input type="checkbox"/>				
b. E-mail	<input type="checkbox"/>				
c. Listserv	<input type="checkbox"/>				
e. Web Discussion	<input type="checkbox"/>				
f. Face-to-Face Meeting	<input type="checkbox"/>				

4. Comments:

Table 12. Facilitator Effectiveness Survey Results, November 2006



APPENDIX H

FACILITATOR EFFECTIVENESS SURVEY 2007

Effective facilitation is an important factor in a group's success. Your feedback regarding the facilitation skills of Robin Arnold is requested. All responses will be anonymous. Thank you for your assistance.

1. Indicate the degree to which you agree or disagree with the following statements.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
a. The facilitator listens carefully to all participants.	<input type="checkbox"/>				
b. The facilitator responds to participants appropriately and respectfully.	<input type="checkbox"/>				
c. The facilitator encourages active participation by all members of the group.	<input type="checkbox"/>				
d. The facilitator is approachable	<input type="checkbox"/>				
e. The facilitator provides feedback that is beneficial.	<input type="checkbox"/>				

2. Please use this space for any additional comments that would be helpful to the facilitator in understanding and addressing your needs and your work as a member of the group.

3. Participant-facilitator and member-member interactions enhance group work. Your feedback will inform me with on how effective each characteristic is in encouraging communication with the group.

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A
The facilitator asks reflective questions and/or reflects back statements to clarify meaning.	<input type="checkbox"/>				
The facilitator's body language indicates interest in what the group is doing (eye contact, body position/posture).	<input type="checkbox"/>				
All members of the group are encouraged to participate and share opinions/ideas with each other.	<input type="checkbox"/>				
The facilitator has a plan for each meeting and helps keep the group on track, maintaining order and direction.	<input type="checkbox"/>				

4. Please describe any suggestions you have for improving communication with the facilitator and other members of the group.

Table 13. Facilitator Effectiveness Survey Results, January 2007, Question 1

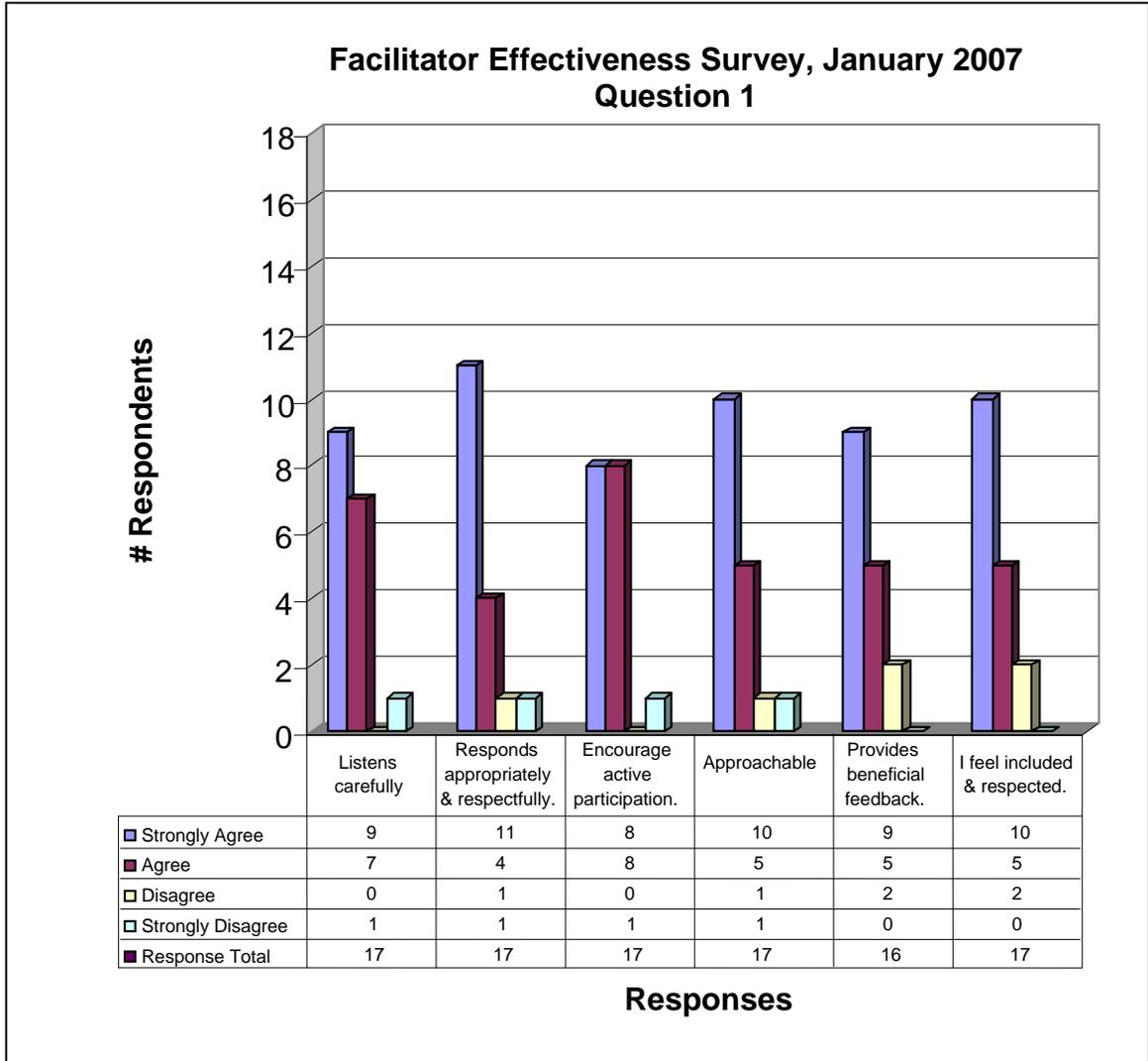


Table 14. Facilitator Effectiveness Survey Results, January 2007, Question 3

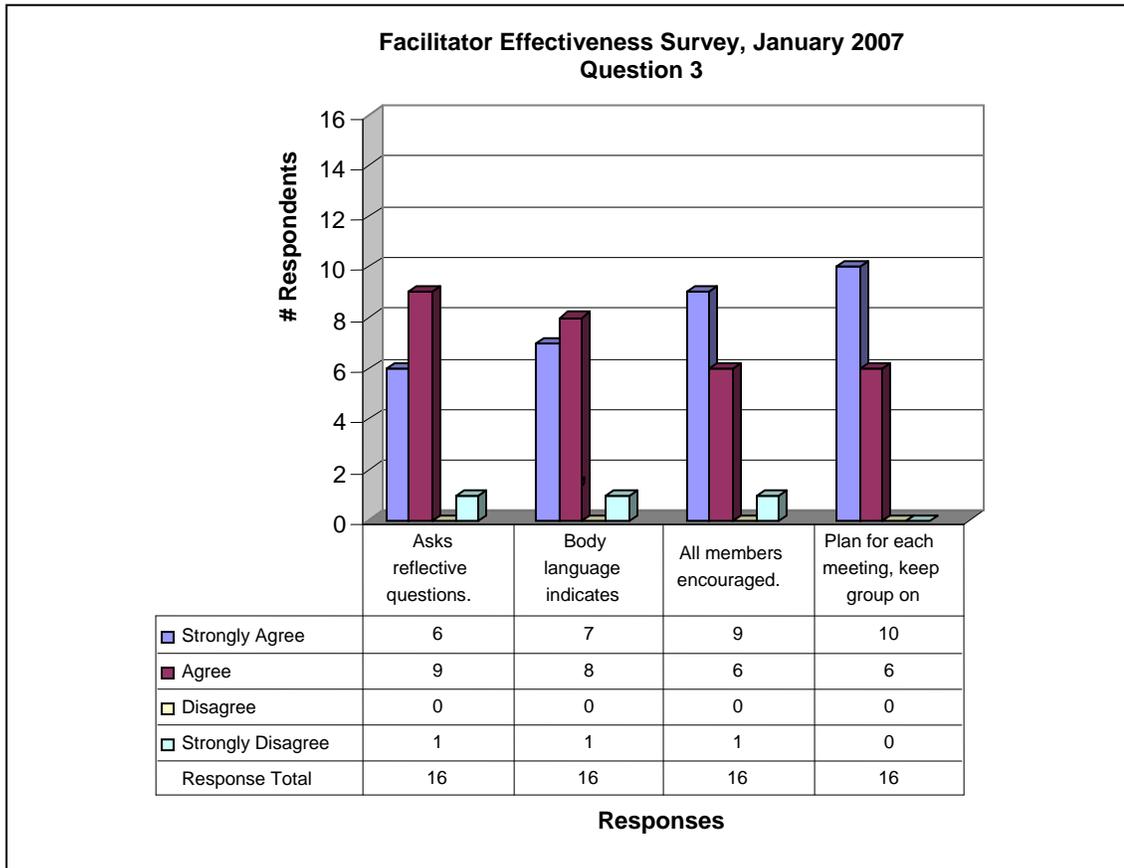


Table 15. Facilitator Effectiveness Survey Results, February 2007, Question 1

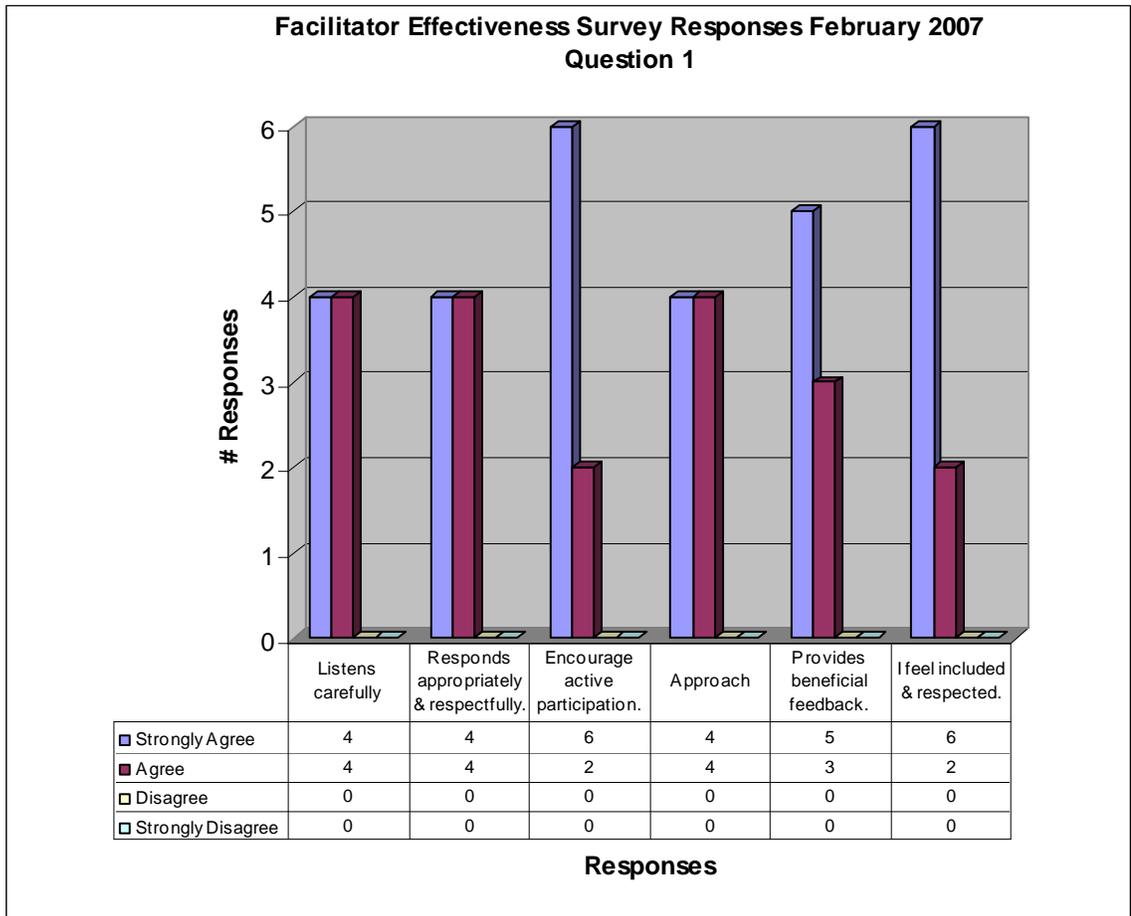


Table 16. Facilitator Effectiveness Survey Results, February 2007, Question 3

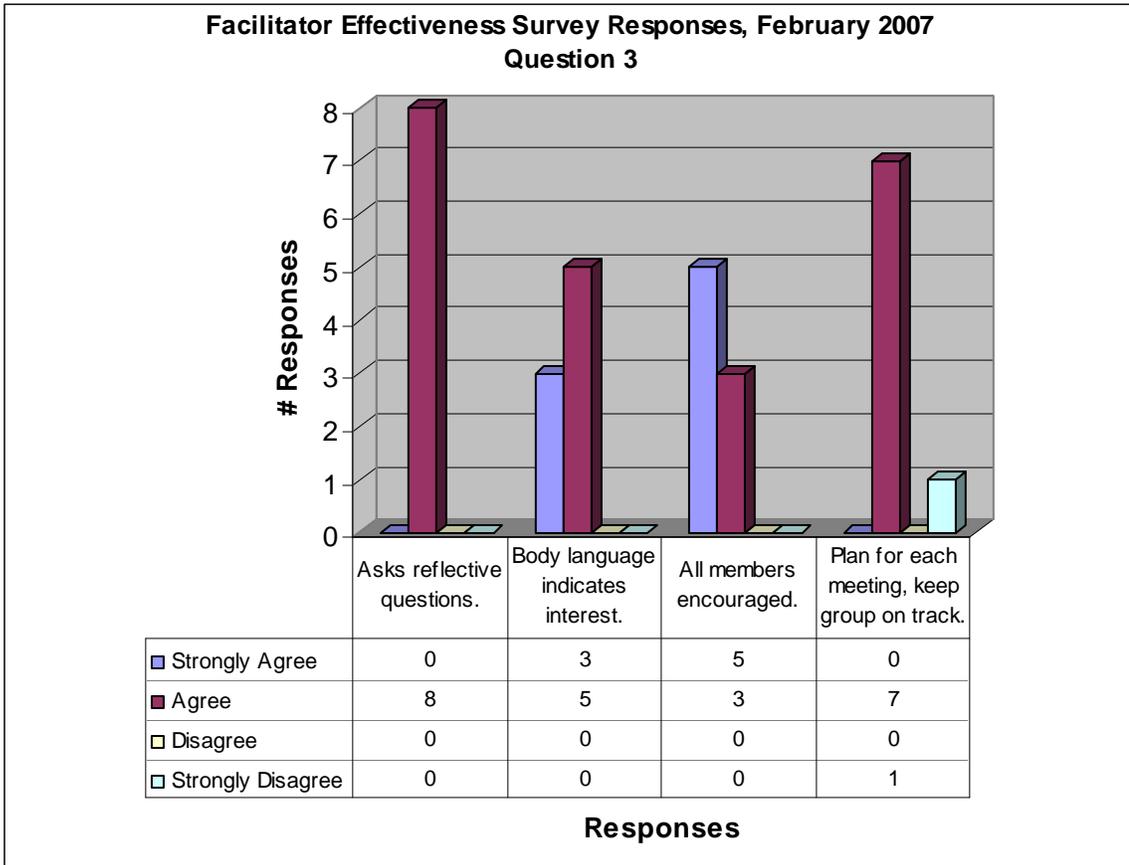
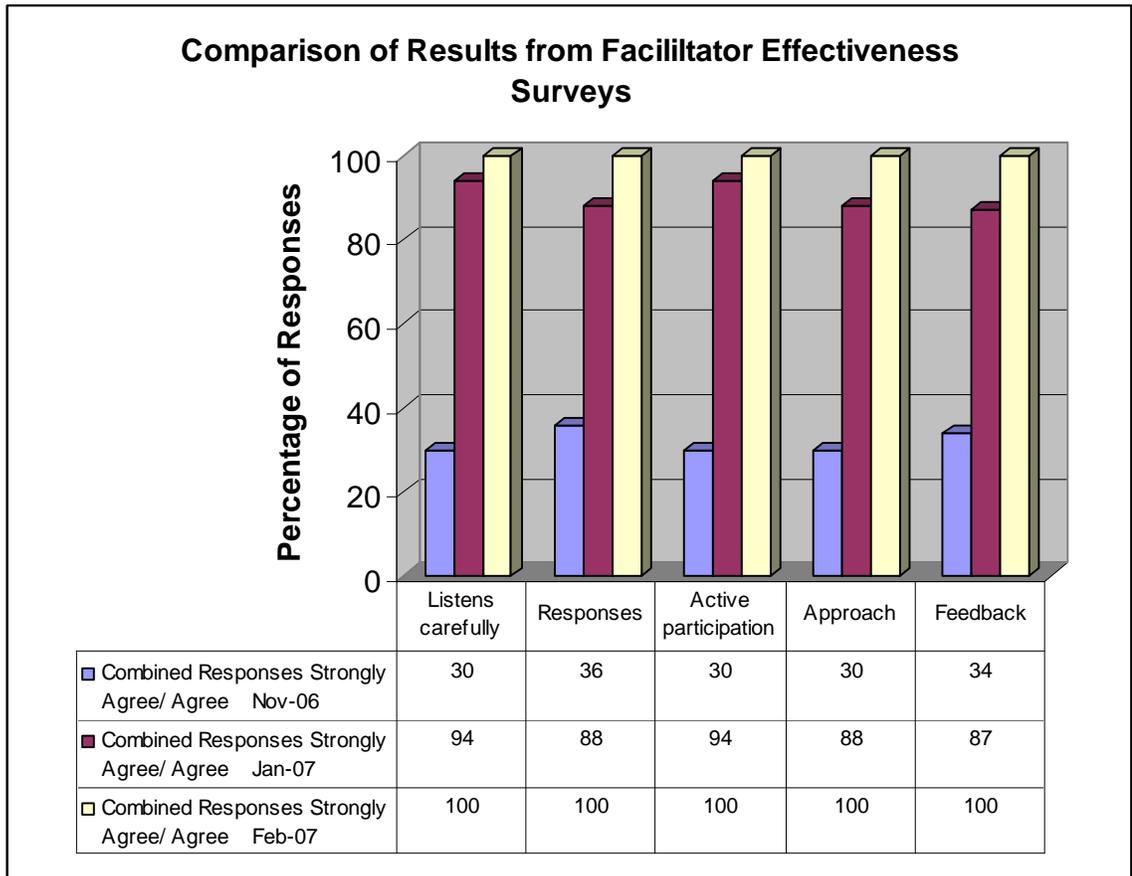


Table 17. Comparison of Facilitator Effectiveness Results



APPENDIX I

PARTICIPANT INTERVIEWS

Question: *What have you observed during your interactions with me as a facilitator that would help me understand what I am doing well and which areas I need to focus upon?*

- 1) You are fair, diplomatic and observe defined talking points. I like the PowerPoint you have designed.
- 2) You are so enthusiastic that some people may view this as too eager and perhaps thoughtless. You may rub some touchy-feely personalities the wrong way. Be sensitive to timing. You're doing a great job learning a lot in a very short period of time.
- 3) You have a confident manner of speaking, but sometimes it may be misconstrued as being authoritative and too strong. You may think about using phrases such as "did I hear you correctly?" to clarify without overstepping boundaries.
- 4) Sometimes your answers are a little abrupt and too quick. You need to listen to what we have to say even when you disagree.
- 5) You're fine, I'm just a task master and want to get to the point. I'm tired of all of the discussing and ready to get to work as we have a lot to do.
- 6) You are working hard to listen to everyone even though some of us are at very different points.
- 7) I'm new to the group so I'm still taking it all in and don't have much to say. There is obviously some history the group has moved through and I'm still sorting it all out.
- 8) You need to trust the people on the committee that are experts and turn over more of the work to them.
- 9) Be careful when you make bold statements such as "I disagree" as some individuals perceive this as rude and overly forceful.
- 10) I know you well and do not take offense when you make strong statements; however, at our last meeting I felt shut down when you told us how we would be proceeding rather than explaining the rationale and asking for input.
- 11) I tend not to say very much as generally a time arises when the issue may be

addressed, but I think the difference in power between your position and mine makes it more difficult for me to say much when I am concerned.

12) Thanks for listening to our concerns regarding the implementation plan and your willingness to create several options for the board to consider.

APPENDIX J

SPONTANEOUS RESPONSES FROM GROUP MEMBERS

1) Thanks for your facilitation yesterday. It was interesting to see the division of “types” and to recognize and consider how it impacts our work. I also really appreciate getting a book to read to guide discussions. As we sat, I couldn’t help but look around and see how many of us, you included are current parents in the district, have graduates, or will soon be student parents. It’s difficult to separate your “take” on things completely to either teacher or parent only.

2) Thanks for a good meeting yesterday--  
I always go home and reflect and think about what people say and learn from that.

3) Thanks for your reminders, we’re all so busy I really appreciate your help remembering when our meetings are coming up.

4) Thanks for listening to me complain, well really not complain, express my concerns. I appreciate that you’re willing to listen and keep going back to discuss my concerns.

APPENDIX K

EXCERPTS FROM PROFESSIONAL JOURNAL

- 1) Taking over a group that has already been meeting for two months and has made some critical decisions and established personal relationships is a bit intimidating. I feel out of the loop and have much reading to do in order to feel at all up to speed with the math discussions.
- 2) I recently facilitated a meeting in which I had not planned an agenda due to some other events that had consumed my time. Although the meeting moved right along and minutes were recorded, a set agenda may have helped produce an even better sense of purpose of group involvement. The group participated well, and much was accomplished, but I keep asking myself how much more effective it may have been if I had been better prepared.
- 3) I feel much more effective when I have had adequate time to prepare and have considered variables inherent in the situation.
- 4) Both the science and social studies CLT groups met today – together – with a guest from Long Island. The meeting was productive and interesting. We all took the Communications Style inventory and found an interesting imbalance of styles. Both groups had similar make-up despite the fact that the individuals project very different personalities and tolerances and very different world views.
- 5) There have not yet been any real decisions to make, although the math CLT meets next week and must arrive at some critical decisions that will require careful guidance. At this point I will need to use my consensus skills to reach some important conclusions and recommendations to the Board of Trustees.
- 6) Good discussions at the recent math CLT meeting; however, difficult decisions at the end of the meeting. I think the group feels crunched and a little scared as the decisions/recommendations we are making will have long-term, far reaching ramifications. I didn't do a very good job of reading the group initially and the mood at the end was a little panic-stricken by some.
- 7) In my work with the Social Studies CLT one member commented that participation in the Communication Styles Inventory allowed them to really begin to appreciate the individual contributions of group members and remember that everyone offers themselves in a different manner and at different times. This appreciation was echoed by several members of the group and illustrated the effectiveness of the tool for the group as they begin a three year experience in the curriculum process. The Lead Teacher group (some of whom are also in the Social Studies CLT) enjoyed taking the inventory a second time to confirm (or refute) their original tendency. This was a self-affirming experience as I was very

concerned about the group understanding the value of the tool for them and not just for me in my quest toward becoming an effective facilitator.

8) Hopefully the groups I have been working with feel valued. I created a survey using SurveyMonkey to elicit feedback anonymously from the members of the group I have worked with most closely. I should have results later this week, so we will see. The verbal feedback I have received has been positive with suggestions for improvement sprinkled in. One of the hardest parts of facilitation is managing my own opinions when they are out of sync with members of the group I am facilitating. Talk about learning to be diplomatic and measured!

9) I am very troubled as the results of the survey indicate that one member of the math CLT feels I am “rude” and another states that I need to provide greater direction earlier in the meeting with work completed in a format fairly different than what I am currently using. Several members feel they do not benefit from me as a facilitator. I have been working so hard to create a respectful atmosphere and respond kindly, but directly to individuals – this feels very negative and is a blow to my self-perception.

10) Visited with my supervisor today and decided to conduct a series of short one questions, open-ended phone interviews with members of the math CLT in order to get personal feedback and ascertain why some members’ perception of me is so different than my own.

11) It’s taken several days to get in touch with members of the CLT, but I think I understand better why some members are put off by my leadership. It seems I have responded using direct language and wording that could be perceived as “rude” even though it was not intended in that manner.

12) The science and social studies CLT meetings are moving smoothly with positive group interactions guided by my questioning and reflecting back designed to clarify and encourage further discussion. Members of both groups appear engaged and interested in participating in discussion. I am making a concerted effort to remain neutral and truly facilitate rather than engage with opinionated statements.

13) The Indian Education Lead Teacher group continues to meet on a bi-weekly basis, alternating between professional development course work in the evenings and group participation and curriculum design during one-half day meetings. My job with this group is inherently easier as I am truly a guide, ensuring presenters and group members have the materials needed and that bodily needs (food,

water, breaks) are met.

14) The science and social studies committees are making good progress on their vision statements. The meetings in January were more relaxed as I have tried to keep the agenda minimal in order to allow people to participate in discussion of the vision statement and the book we are reading. Neither group has had any particular conflict despite the fact that there is an interesting mix of personalities, communication styles and perspectives. The feedback has been generally positive and members seem to appreciate the time to process information.

15) I have completed my second survey soliciting input from members of the science and social studies CLTs. The survey is slightly revised in that the second set of responses is geared toward collecting more relevant information. The responses, except one outlier, are very positive. The written comments indicate continued need to moderate my strong opinions. I have to remember that my role as facilitator is to keep things moving and ensure everyone is being heard, not necessarily to share in equal part.

16) Trying to facilitate and keep minutes is difficult. I think I do a better job when I don't have both responsibilities, although at times it cannot be avoided. Both the science and social studies groups are having deep conversations about the reading from *Integrating Understanding by Design and Differentiated Instruction*. This week's meetings really focused on metacognition and classroom instruction. Both groups are moving slowly, but gaining understanding along the way. We will need to pick up the pace fairly soon, especially with the Science CLT as we need to begin discussing standards and assessment again soon.

17) Received spontaneous feedback from a reading intervention teacher today. She thanked me for an effective meeting and stated she believes the work we are doing as a group is very beneficial to everyone. This comment along with a similar comment from another member of the same group affirm my belief that I have become a fairly effective facilitator and am beginning to really apply the understandings gleaned from Goleman and The Arbinger Institute in particular. I feel good about my progress and am beginning to become much more comfortable in this role. It is not easy to be constantly vigilant, but absolutely necessary in order to avoid misunderstandings and ineffective work. I am exhausted, but elated with my progress.