

## Compression Planning BrainTrain - Design Lite by Morris Beverage



*“The leaders who work most effectively, it seems to me, never say ‘I.’ And that’s not because they have trained themselves not to say ‘I.’ They don’t think ‘I.’ They think ‘we’; they think ‘team.’ They understand their job to be to make the team function. They accept responsibility and don’t side-step it, but “we” gets the credit. This is what creates trust, what enables you to get the task done.”*

—Peter Drucker

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My friend Morris Beverage is President of Lakeland Community College in Kirtland, Ohio. He has a long association with both the community and the college. Born and raised just five miles from his office, he attended Lakeland as a student.

He began his professional career as an auditor and made several career moves related to finance—working in manufacturing; as a city finance director; a chief fiscal officer and then as treasurer

for the community college. He also taught budgeting and strategic planning at Cleveland State University and accounting at Lakeland. He holds a doctorate in management.

Morris became President of the college six years ago. Four years ago, he attended Compression Planning® training.

**Jerry:** As a college president, it’s unusual that you use Compression Planning (CP) the way you do and I’d like to view the process from your perspective. As I recall, you went through the basic CP training about four years ago, kicking and screaming.

**Morris:** Honestly, I went voluntarily because I’d heard about the process and wanted to experience it firsthand. However, it is unusual for someone in my position to sit through multiple days of training. I came, not quite knowing if I would ever use it. At the time, we weren’t doing much in terms of external facilitation with outside agencies or project groups.



We didn’t have our non-profit center running at that point, and now as I look back, I think going through CP training helped us to understand how we could develop a service like the non-profit center that would meet a need within the community.

### Using CP principles to transform a conversation into a planning session

**Jerry:** Can you share some examples of what you have done?

**Morris:** Shortly after CP training our local United Way invited me to help in one of several service

areas, such as senior programming, housing, youth and children services. First, I wanted to know more about what they hoped to accomplish. Their goal was to conduct an in-depth examination of how successfully the United Way identified and met the community needs.

As we talked, I became more interested, so I asked questions that eventually became headers:

- How are you going to do this?
- How are the service panels going to function?
- What are your expectations?
- How do you see this happening?

Instead of serving on a panel, I volunteered to facilitate their planning process. From that first experience, the CP process has become almost a cornerstone within the community. People still talk about the facilitation that Lakeland did for the United Way panels and how energizing the process was. We conducted two panel-planning sessions each night for two nights using Compression Planning as our facilitation strategy. Although it was mid-summer, people really responded and we had a packed house. People were fascinated with how quickly we moved along and how much they accomplished so early in the process.

In just one evening, we led panel members, who were meeting for the first time, from a very broad perspective into the specifics of what they wanted to accomplish, and what they needed to do.

We worked with about 25 people per panel, each night, so in total 100 people went through the planning process. Soon, word started to get out as things moved forward. As a result other groups came to Lakeland, to ask for our help, and we've done a couple of dozen sessions over the past few years to help local agencies, public service, government service, governmental agencies, accomplish any number of different things.

### **Helping a Board of Directors re-size itself to become more effective and efficient**

**Morris:** We do a lot of strategic planning and some board development. Sometimes non-profit agencies have boards so huge that they cannot operate efficiently. We met with a 31-member board, which operated with 15 committees. No one person knew everything that was going on.

There were more board members than full-time agency employees. We ran a basic Compression Planning session and within three hours, they agreed to condense the board down to nine and do away with committees, and function as a committee of a whole. We also used CP to help them draft an action plan — who would do what and by when. We met on a Saturday, and I think we shipped off the report to them on Monday or Tuesday.

**Jerry:** Just to bite the bullet of going from 31 to nine, is a monumental move for a board of directors.

**Morris:** Yes and transitioning people through the process was fascinating.

**Morris:** We tried looking at things from the board member's viewpoint; we asked for their assessment about the size of the board; the legal relationship; and the fiduciary responsibilities.

Then we turned things around to consider the specifics of what a representative board might look like. We asked them to tell us how they could maintain a continuity of knowledge with that many

board members and 15 functioning committees. The agency staff spent so much time preparing for board meetings they couldn't do their own jobs.

**Jerry:** Another group once told us they cut the amount of staff time involved with board work by 80% — and did a better job.

**Morris:** Right at the beginning, we made it clear that we were not board experts. We came to serve as facilitators with a process.

**Jerry:** They had to address their own issue with the board? That's a big trust move.

**Morris:** Yes, and in part, that model was actually the college's model. I heard comments about the need for committees to study finance or operations or facilities. So I pushed back a little bit and asked what the organization might be like if there were no committees. I run a \$55 M. organization with nine board members and have no committees. They had a \$5M organization with 31 board members and a dozen committees!

At one point, Wynette (Dr. Wynette Barnard, Vice President for Community and College Relations) pulled me aside and cautioned me that I was advocating for my position. I was trying to be very disciplined about showing them another way. I asked the group if I was forcing one role or position. And, they said "No" — actually, they said all of a sudden they saw the bigger picture.

### **Working with a balanced team allows flexibility to confront tough issues**

**Jerry:** You, Mary Ann Blakeley, (Executive Assistant to the President & Director for Human Resources & Organizational Development) and Wynette worked as a facilitation team. You had the knowledge and capacity to put content out there, and challenged the group to react. I think that's good facilitation. You didn't stubbornly advocate a position. You used that reference to provoke the group. A male/female team has real strength. I don't think that's sexist. Together, the three of you bring different approaches and the rich mix of the team really helps the group.

**Morris:** Exactly. If people ask me to facilitate personally I assume they come to me, in part, because of the role I play here. So, then I have more flexibility and liberty to play the role of provocateur and to do that in a non-threatening way.

For example, a woman at that meeting was almost obstinate in her position that we had to have committees, and she just couldn't see it otherwise. I tried to respond to her and keep the balance of the conversation going with everyone else.

At one point it was clear that she couldn't move on, so I pulled up a chair in front of her and looked directly at her, and said, "You and I need to have a conversation about this. Tell me what is your stumbling block? Tell me what you don't understand so that I can help you."

**Jerry:** Did you do this with everyone else watching?

**Morris:** Everyone was watching, but I didn't do it to put her on the spot. I honestly needed to understand her concerns. Symbolically I said, "Forget about everybody else. This is just you and me now." To her credit, she was able to do that.

We struggled for a bit and we separated assumptions from fact. The fact of the matter is, you don't have to have committees...but you may choose to. Later that day, I heard from other people that for them, that was an a-ha moment.

**Jerry:** That's good facilitation, too. "Help me - I don't understand where you're coming from." You presented other options to offer them a new perspective.

**Morris:** At some point we considered how many committees might be necessary and in what areas. They came up with three or four major areas, such as finance and personnel – and these were going to be the major committees. Not 15, just three or four. However, in the end they decided to go without committees at all and instead move to a Committee of the Whole structure.

**Jerry:** Talk more about being a college president and being a skilled facilitator using Compression Planning.

**Morris:** I'm pretty well-known in the community and believe I have a fair amount of credibility, since I was born and raised here. I bring some history with me to the facilitation. My doctorate is in management, so people actually think that I know what I'm talking about. The other factor is that Lakeland — and we've worked hard to cultivate this — is viewed as a neutral site. Typically, we have nothing to gain in these facilitations.

For example, one session involved an association of mayors and managers. On a gorgeous fall day, over a hundred people came to together to consider consolidating city services—trash, police, fire—these are incredibly hot issues. The college served as a neutral site, a neutral convener, if you will. We used Compression Planning.

### **After years of discussion – CP helps communities resolve sensitive issues in 3 months**

**Morris:** Recently, we facilitated discussions regarding the creation of a port authority and we used the principles of Compression Planning to get it done. After three years of discussion, we facilitated the discussion and got the job done in three months. Just last week the county commissioners voted to approve a countywide port authority.

We do get the job done and we're viewed as being both neutral and competent. As a facilitator and the head of the college, when I hear that, I think it's a great advantage.

**Jerry:** I'd like to dig out Morris' presidential view of hints for leaders who are interested in Compression Planning.

**Morris:** CP provides a mental template. We've talked before about Compression Planning Lite. I can sit in a meeting and begin to project ahead in my thinking. For example, a group is organizing around a topic — what will they do? What should they not do?

**Jerry:** So you use the CP lite model — mentally, as you plan?

**Morris:** Right. Part of the value of Compression Planning is being able to hone in on what action we must have now; asking, "What's the purpose of this project, as compared to what's the purpose of this session?"

For example, looking back on the port authority discussion that I facilitated, late last year, our local congressman and the president of the commissioner's board convened a meeting. They invited representative officials from cities, villages, and townships in our county to have a conversation about the port authority.

The congressman and commissioner spoke, and then someone from Cincinnati spoke. They asked me to facilitate the Q&A piece. That was simple enough. I knew there would be questions requiring

an immediate answer and others that could wait. In my mind, I thought, 'What do we need to do first?' and 'What can we do later?'

At the end of the Q&A, they asked me to facilitate further conversations but instead I offered to summarize what I'd heard so far. In part because of the way that Compression Planning structures a conversation, I was able to share that they were much closer to a solution than they thought. They needed some additional information to clarify misconceptions, but they were well on their way.

I advised them not to worry prematurely about issues — and some decisions could be deferred for several years. We were able to focus prioritize on those areas requiring immediate decisions.

**Jerry:** You were in a "Design Lite" framework. You saw a mental storyboard?

**Morris:** I visualized the background piece. Since I'm from the area, I knew a lot of the background, so I was able to quickly assimilate this, and play it back for them and begin to show them a pathway out of the wilderness. One of the mayors came up to me last week, and referenced back to that meeting, and told me he thought my summary was unbelievable. He said it was just what they needed to hear. Having gone through Compression Planning training, I was able, mentally, to frame the conversation.

**Jerry:** Did you have a non-purpose?

**Morris:** Part of the conflict was due to misconceptions ... there are four municipal port authorities within our community, and everyone believed all four had to be dissolved before a county port authority could be created. That was not the case.

**Jerry:** So did you articulate it that way?

**Morris:** Not at that meeting, but subsequently we did. Decisions on the existing authorities were not immediately necessary. Communities could choose to join later and then can abandon theirs or keep it and set up a structural relationship.

**Jerry:** I see - you took that topic off the table in your summary. That's a non-purpose in my eyes. It's worth a great deal when people say, 'It affects my thought process.' If they go back and ask, 'What's the topic here?' — 'What are we trying to accomplish, overall?' It's possible to use the same design as a thinking process. You can use it in anything.

**Morris:** That's exactly right. When I talk about Design Lite...in a meeting, after spending a lot of time talking and rehashing things, you can hold people accountable at the end of the meeting. — 'Who's doing what, and when?'

**Jerry:** That's the Master Planning Model®. Final thoughts — if you were to advise the president of another community college who's looking at Compression Planning, what hints would you offer?

### **Change the design focus if the group flow dictates**

**Morris:** I recall a session where one of the non-purposes was not to define the word 'mentoring'. Halfway through, the group began talking about the definition of mentoring. So, we called a time-out. We reminded them that they didn't want to worry about defining mentoring and yet they were focused on it. We offered to make that the purpose of the session. They agreed to leave it as a non-purpose, and later they shared with us that for over a year this had been the stopping point of all their discussions.

**Jerry:** I can't tell you how many times over the years I've heard of roadblocks like that – and when the group recognizes it as a roadblock, it becomes a non-issue.

**Morris:** Also, I think no matter how much effort you put into planning, there's always that one meeting or facilitation that takes off in a different direction when you're midway through. There's an art to being able to leave the pre-planned design and go with the group's need. It happens in the moment. That's another good reason to facilitate as a team, at least initially.

**Jerry:** I don't remember a session that didn't require some level of modification.

**Morris:** The compression factor is challenging. There is a sense of urgency and time constraints. While some people respond positively to that, some do not. Some people freeze up when you put a clock on them. It's like sticking a microphone in front of somebody; and suddenly their mind goes blank. I've learned that it's good to have someone on your team in the background just watching faces and observing to see if people are still tuned in or are they checking out.

### **Committees that use CP demonstrate superior outcomes at Lakeland**

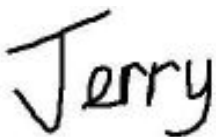
**Morris:** Finally, I find that the process forces you to plan before going into a meeting. Using CP throughout Lakeland has created a common vocabulary. Un-focused meetings can drain time and energy from committees. On our campus, committees invite us to facilitate discussions because they know a lot will be accomplished.

**Jerry:** How much time is saved? Can you quantify that impact in any way?

**Morris:** Not in terms of hours, but in terms of outcomes. Committees that take advantage of the process demonstrate far superior outcomes. They accomplish their mission. We have committees that languish and do nothing and people become frustrated, so little by little I think we see more and more of our internal folks — who don't know the first thing about Compression Planning — coming to us for assistance —because they know we can help them achieve their goals.

Compression Planning brings clarity where there is ambiguity. Perhaps not all the answers immediately surface, but CP will separate the wheat from the chaff. It pulls apart complex areas and allows us to identify what can, and cannot be done, what to focus on and what not to focus on. I'm impressed with the ease of buy-in. The process allows equal participation, so when everyone walks out, even if they don't agree with the outcome, they agree with the process, which can be important on collegecampuses. CP values both people and process.

Best wishes!

A handwritten signature in black ink that reads "Jerry". The letters are cursive and slightly slanted to the right.

Jerry

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