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Canadian Association of Family Enterprise

KNOW-HOW FOR PAG VITALITY

Personal Advisory Group

The successful PAG is one in which the members freely and openly interact with a complete understanding of the consequences of their statements, opinions, and support. They achieve success because they have become a caring group. The successful PAG is characterized by the extremely high level of personal respect shared by all PAG members. Participants in a successful PAG should expect an atmosphere of trust and openness, in which each can contribute and individual problems and opportunities can be shared.

The ingredients that go into developing the successful PAG are:

- PAG norms
- PAG purpose and structure
 - PAG constitution
 - PAG meetings
- Communication skills for PAG meetings
 - Language Protocol for empowerment
 - Active listening skills
 - Effective feedback skills
 - Open communication skills
- Group dynamics know-how
 - Moderating with completing cycles
- Understanding and appreciating different personalities

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FOWKE PROGRAMS FOR PAG

PAG trainers and facilitators, Bonnie and Don Fowke, offer three programs for CAFE:

MODERATOR TRAINING: IMPROVING YOUR PEOPLE SKILLS

Intensive exposure to PAG practice and methods, including constitutions, norms, meeting structure, personality mapping; hands-on experience in the PAG process; and intensive interaction among participants. This is the Moderator Training Program offered annually at cities across Canada. CAFE PAG Moderator Training Programs can be arranged through Marianne Ericksen, CAFE National Office, at 615 Yonge Street, 5th Floor, Toronto, Ontario M4Y 2T4. Telephone: (416) 966-0661.

PAG RETREAT

Professionally facilitated 1 1/2 day retreats designed to take your PAG to higher levels and more advanced stages. Build trust and create new vitality in your PAG. Experience the Lifeline, the Enneagram, the trust walk, and Xualization. Call Bonnie or Don Fowke directly.

DEFINE YOUR MISSION

A professionally facilitated PAG meeting which builds consensus on why you are here and what you want to achieve. Experience good technique and define your mission. Call Bonnie or Don Fowke directly.

WHAT IS A PAG?

A CAFE Personal Advisory Group is a group of 10 - 12 members who agree to meet regularly to share personal and business ideas and help each other overcome problems. It provides the group's members with expert, objective and intimate advice in an atmosphere of mutual trust and support. Some Groups are for C.E.O.'s and others are for various family members. It is a highly successful program in the Young Presidents' Organization, which CAFE has adapted to help our members gain new perspectives and better understanding of the challenges of family business.

The keys to success are confidentiality and commitment to attendance. Meetings are arranged every 4 - 6 weeks and last about three hours. Once or twice in the year an overnight "retreat" is arranged at a remote location. The Personal Advisory Group is self-directed by an elected Chairman. Meetings are arranged by the Chairman at various members' premises or at a club or hotel. The only costs incurred are those in connection with meetings and these are shared by members of the Personal Advisory Group.

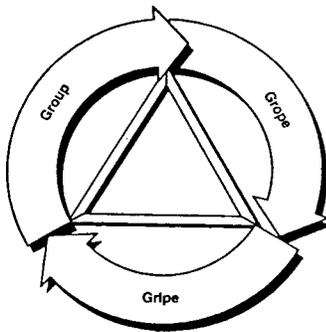
WHAT IS CAFE?

The purpose of CAFE is to promote the health and growth of family business in Canada. More specifically, this means that members are dedicated to the perpetuation of the family business through exchange of experiences, ideas and education.

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GROUP DYNAMICS KNOW-HOW

Manage with Completing Cycles



The idea of a Completing Cycle is an important one for PAG. You can apply it to a three-hour meeting, to a one-and-a-half day retreat, or to moving through the phases of development in a PAG. A Completing Cycle applies to groups in general and helps a moderator gently guide the natural processes at work within the group, and apply leadership so that these processes come to completion. Otherwise, people get frustrated and feel left hanging in the air.

Learning to shift the group's attention and complete each cycle is helpful in individual meetings, retreats, annual programs, or the development of the PAG as a whole.

In a small group setting we will explore the basics of this concept and train you in its application.

COMMUNICATION SKILLS FOR PAG MEETINGS

Openness in a trusting climate is the goal of most PAG groups. Trust develops with increasing the skills of members to communicate with each other. Communication skills then become one of the most important aspects of PAG membership. PAG members can learn skills in communicating that improve the depth of contact between members.

We find that teaching simple Language Protocols based on the principles of Gestalt is the most effective method to quickly bring a group closer together. Other skills can be learned in Active Listening, and in giving Effective Feedback to improve interactions among the group members.

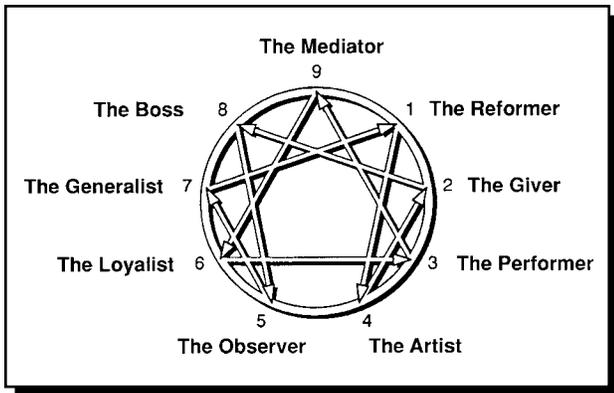
Gestalt Protocol:

1. I will speak in specifics, not generalities.
2. I will use "I" statements (not "one" or "you", but "I").
3. When I say "I feel", I mean real feelings like sad, mad, glad (rather than I feel you don't understand).
4. I will say "I won't", not "I can't".
5. "I choose" will replace "I should", "I must", or "I have to".
6. I will make a statement (to declare my position) before I ask you a question.
7. I will ask "how?", but never "why?".
8. I will replace "I don't know" with "I won't decide" or "I don't want to say".
9. I will speak from my own experience, rather than give you advice.

PERSONALITY KNOW-HOW FOR GROWING YOUR PAG

The Enneagram

Knowing your personality type provides you with an insight into your way of dealing with events. Understanding the personality type of each member of your PAG and work team can help you better understand:



- The dynamics of the group with which you are working.
- The unique strengths of each individual.
- The contribution of each individual.
- Potential blind spots in your members' understanding of issues.

Importantly, use of a systematic way of describing people provides PAG and management team members with a vocabulary for discussing differences to enable the team to better make use of the resources of all its members.

We have used the Enneagram as a tool in personality study for many people and organizations. One participant wrote: "I really considered the training a 'life change' experience. To use the words 'take home value' would be an understatement." We will use the Enneagram as a tool for personality study with your PAG as part of a retreat.

TAKE YOUR PAG ON A RETREAT

An annual or semi-annual retreat is a chance for the gang to get away for a couple of days together, and to really get to know one another. Some people start the year off with a retreat, or use it as an induction point for new members. Others like it in the dead of winter to help the group settle down to serious business. Retreats that are mostly recreational are fun, but do not take full advantage of the opportunity for the PAG to reach higher levels of experience and to renew. To grow a PAG or to maintain a level 3 phase of development a carefully structured retreat is important. Experience says that the best remedy for a failing PAG is a retreat.

We are skilled at facilitating retreats that will give your PAG a "power-assist" in growth and development.

Or we will assist you in the design of a retreat appropriate to the level of development of your PAG that you can run yourself.

BENEFITS OF PAG

The PAG provides an opportunity to share experiences, to give support as well as receive it. PAG participants have an opportunity to grow as individuals by coming to understand the impact they have on others. Through listening to the issues of other members and supporting them in the resolution of their problems, the PAG member has an opportunity to truly "make a difference." Conversely, when a PAG member is in need of guidance, he can benefit from the experience of others. Following are some of the **major benefits** of PAG participation.

1. **Personal growth benefits** - The individual participant in a successful PAG finds that he makes a difference among his peers, that his input, creative capacities, and ideas directly affect his fellow PAG members. He looks deeper into his own personality, make-up, and experiences to draw upon those insights and opinions which are valuable to the members of his PAG.
2. **Personal business benefits** - The exposure to other businesses and business methods will expand the specific knowledge of all individuals in the PAG. Participants will become more aware of certain specialized information which may be useful in present or future business activities.
3. **Educational/idea exchange benefits** - Members of CAFE join primarily for the purpose of exchanging ideas, and most understand that the greatest educational benefits are those gained from exposure to other CAFEers and spouses, their concepts and their opinions.

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FOWKE LIMITED CONSULTANTS

Bonnie Fowke

Eighteen years consulting experience in organizational development and human resource management for clients in mining, manufacturing, oil and gas, computers, communications, distribution, personal service, health and social service, and government administration. She provides Forum Moderator Training to YPO and WBC. She is a graduate of the University of Saskatchewan and a Certified Management Consultant. Formerly a principal with Hickling-Johnston and Associate with William M. Mercer, she is a Managing Director of Fowke Limited in Toronto.



Bonnie Fowke

Donald Fowke

Twenty-seven years consulting in strategy and organization to chief executives in a broad range of industries and to leaders in government on policy and administration. He provides Forum Moderator Training to YPO and WBC. Formerly Chairman and CEO of Hickling-Johnston Limited in Toronto and Calgary, and Managing Director of William M. Mercer Inc. in New York. A graduate of the University of Saskatchewan and MIT's Sloan School of Management. A Professional Engineer, and a Fellow of the Institute of Certified Management Consultants. Formerly a member of YPO, Mr. Fowke is a member of the World Business Council. He is a Managing Director of Fowke Limited in Toronto.



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SERVICES

Strategic Management

- Strategy formulation
- Consensus building
- Strategy implementation: Goals, Tests and Operations (GTO)

Organization Development

- Matching organization to strategy
- Improving organization effectiveness
- Strengthening corporate culture

People Development

- Executive team building
- Assessment and succession planning
- Executive Enneagram personality mapping
- Forum Moderator Training
- Executive retreats
- Strengthening management through training in the human side of enterprise

BENEFITS OF PAG, from page 3

4. **Chapter benefits** - There should be an increase in cohesion with the Chapter participating in the PAG experience. The PAG integrates personal experiences and brings those individuals and the Chapter closer together.
5. **CAFE benefits** - PAG benefits incorporate themselves into the total CAFE experience, making individual CAFEers more open and free in their experiences and exchanges. The PAG is a program concept which attracts individuals who concentrate on the purpose of CAFE, bringing that purpose to the forefront of thinking at every level of CAFE.