

Chap. I - The basic idea

"Formazione-intervento ®" is a process that enables a person or a group of persons to realize a change for themselves, for an organization, for a territory, and to take this opportunity even as a learning process. As a consequence of this fact it becomes a method to learn new knowledges. In both cases, as changing and learning method, it helps people in developing new competences and a greater awareness of their own way of learning. It would be used also to adapt the learning system of individuals, of organizations (as a sum of individuals in different roles) and of territories (as a sum of individuals in the organizations).

The "Formazione-intervento®" is a methodology that has been and is still used for the improvement of the organizations. It is based on the central importance of every person in organizations, so it strives to create conditions of work according to this principle, and to create processes of change and learning processes congruent with this idea.

In terms of the organizational solutions to which it aims for, there is the bent to build conditions that allow at all the different levels of the organization to express innovating abilities and not just those ones connected to the management of the routine.

In terms of organizational change processes, it aims to create conditions that enable all actors of the internal structure and of the reference context to participate in the redefinition of the operating conditions, and in the design of improvement. It is possible so to activate a "Formazione-intervento®" process to implement a project of organizational change, technological innovation, social research.

It is even possible to use the methodology as an educational instrument to acquire knowledge, to develop an ability, to understand how to play a role. Indeed it makes effective the learning process of a person, of persons in organizations, of people in a territory.

About the learning processes, it aims to combine sources of knowledge, allowing to all actors involved to recognize within themselves the knowledge held (tacit knowledge), to collect explicit spread knowledges, to express their creative potential, to develop new knowledge.

It assumes that an individual activates even more its internal learning motor when he is placed in front of the need to address a challenging project on an issue or a problem that concerns him directly and intensely. Traveling to a land that you want to discover, immediately triggers the need to gather information, collect experiences of others in this regard, prepare yourself to look and understand what you will see, share with others the project of the trip, live again with friends the experience.

It assumes that people, all, have the ability to design and plan; someone, perhaps, need more than others to be encouraged to do it, because they get influenced by the context or by their fears. This means that we must find ways to enable people to free up this capacity and recognize to themselves the right to exercise it.

It has been developed, initially, as a methodology for organizational change, for innovation in general, but it has shown up after, also as learning methodology tout court. We became aware indeed that to change organizations it was necessary to go through the learning of the people who composed them. The efforts to bring to maturity this learning enabled us to understand that the techniques used could also be used at any time there is a need to learn.

What has been discovered lies in two basic aspects of the methodology: the approach to the complexity, the planning path.

Changing an organization or develop an innovation requires the ability to look at a reality in its complexity and find solutions that give an overall response to all the initial problems or to the new needs. This new way of looking at reality induces a transformation of the way we were trained. The separation of knowledge and the disciplinary training have accustomed us to look through a

"functional" eye, to see one aspect of the reality and not the combination of all those which compose it.

The exercise that the methodology allows to do to people involved is just the opposite: watching the whole set, see all its parts, evaluating which ones are to be optimized both from their specific point of view and for a new interrelationship with the others, finding appropriate and shared by the context solutions.

Even when the people involved are numerous and it's useful to divide the work between them to reduce individual fatigue, the methodology always leads them to reconstruct each work in a set.

The mental effort required to people is high, because it requires them to confront themselves with the complexity of reality and with the unknown of innovation, two destabilizing aspects because they give uncertainty, arouse insecurity, produce anxiety and sometimes extreme forms of addiction or conflict in respect of who is the cause of this situation.

After the first time, when people realize that the solution is the result of a work they have to do on themselves, firstly changing their own way of looking at reality, the result of the ideation is assured and the value of the gained learning is concretely felt.

The other unique aspect of the methodology is that one of planning.

The methodology leads to change or innovation. These are not the result of a baseless intuition or an immediate response, or the past experience, but the result of a research and planning process that involves the people and the context in which they move. The methodology suggests to curb the habit to give to a problem the first answer that comes to mind or to collect from others the answer to be given, but to develop a logical path that enables you to search, evaluate, interpret all the elements of the system on which you operate, to critically confront with solutions pursued by others and then find within themselves the strength to express a solver hypothesis, which will be your responsibility, together with those who you involved. This process

strengthens three aspects of competence: analytical ability, creative ability and confidence in our own abilities.

The methodology requires, basically, adhering to the belief that people should be able to live peacefully without being crushed by any kind of abuse. To do this they must get rid of the limits set by themselves and others and they should, conversely, believe in their own potentialities and work upon themselves to train and develop them. Since the community in which people live is a constraint, but also offers opportunities, the methodology teaches to involve members of the community in a mutually beneficial exchange.

It is, however, disturbing for some who may still believe that, as you divide the work in an organization, by different functions, you can also divide people by the functions attributed to them in and out of it.

Taylor developed these theories and in a certain age his theories and those of Fayol were successful. For both of them dividing the work by functions and assigning tasks by role, corresponds to a theory based on the underlying assumption that people are different and so remained.

A Fiat manager wrote: "in the current context, learning, learning to learn and learning to accept change to manage it are critical skills required to all the people, those holding roles of huge responsibility as well as those engaged in operational activities".

"Formazione-intervento®" methodology assumes that all people, located in certain conditions and trained properly, can interpret all functions and can cover all the necessary roles or at least most of them.

Finally, it hopes that the person does not turn depending on the context within which he operates and live, but he is always the same in every context and should be considered in this regard by the community in which he lives and works.

Human beings should be seen in their totality and not in a different way according to their presence in the organizations where they live and work. At the same time, the methodology assumes that even the organizations should consider themselves always a part of that set that the community has created.

A further distinctive feature is that it considers all human beings able to learn and evolve when around them there is love and not fear, trust and not suspicion, generosity and not selfishness, peace and not war, cooperation and not competition. When change processes have "sense", a sense for the belonging community, but more generally for life itself.

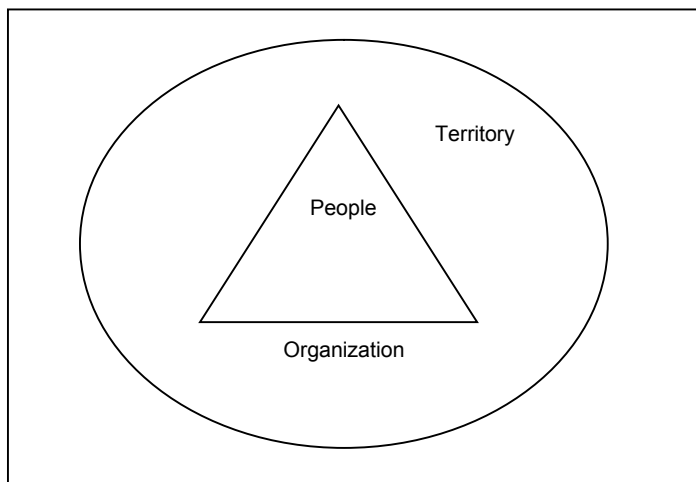
It therefore aims strongly to develop a learning process for all those it can involve, a learning process that serves to reconsider the situation in which we often adapt ourselves to stay and that we accept, causing disadvantages to ourselves and to the organization to which we belong, as well as to the community which relies on that organization for the satisfaction of its needs. It aims therefore to develop an awareness that change is not impossible, often useful and that, by acquiring instruments a bit more effective, we can improve everything, starting from what we have closer.

Finally, it considers that individuals, as well as organizations, have the need to live the present and build the future. Management and innovation must therefore cohabit in each system. Separate the two sides, looking for efficiency of specialization, brings us back to the Taylorist conception of work and forces us to think that there is someone who thinks innovation for everybody and there is someone who cannot do it.

Chap. II The intervention levels

The intervention can concern:

- people who want to gather new knowledge to become citizens of the world. The children in the first place, but also all the other people that have to or want to learn or keep on learning;
- people who want to gather new knowledge and skills to play a role they aspire (engineer, jurist, trainer, etc) or a role that their belonging organization want for them (head of production, sellers of commercial network, program manager, tourism expert, etc);
- some people from the same organization, already covering specific roles and that, as a whole, are facing a change concerning the entire organization or a part of it (a new market to enter, a new planning and control system, the introduction of a quality system, the acquisition of a new technology, etc);
- some organizations of the same territory, which want to work together to develop new joint initiatives or to improve the conditions of mutual interrelationship, in order to offer different products or services, optimize processes, reduce costs, improve conditions of local development, protect environment and landscape, etc.



They thus become fields of action and characterize the way in which the methodology is applied. Anyway the basic criterion of the methodology for all of these fields is that the person or people involved, the organizations, alone or associated, develop a "project" to learn and change.

We explore below the intervention meaning.

2.1. The person and the role

Sometimes a person is placed or placed himself in a learning condition to increase his knowledge or to acquire new skills. Children, who need to learn where they live, need to develop a greater knowledge of the context in which they reside. This can be done by transferring a set of knowledge and verifying that they have been acquired and stored. The methodology involves them instead in a research project on their territory. It will take them to find out where is the knowledge and wisely put it together to finally know how it's done their territory. The methodology helps children to follow this process by providing support on the method with which to make an effective research along the search process, but also involving around them the entire educational community (teachers, parents, local administrators, scholars, companies, associations, etc.).

Sometimes the person finalizes his learning effort because he aims to play a different role. A college student who wants to be a "trainer" or "educator" enrolls himself in the Educational Science Faculty¹, imagining to acquire the knowledge and skills necessary to carry out the typical work of that role. A "technician" who works in an organization and aspires to become a "leader" knows he has to gather new knowledge and skills, especially regarding the management field. The same organization where he works will ask him to participate in training opportunities and will text him in "decision-taking" situations to develop his managerial skills and to see if the change of role is advantageous. An administrative officer of a municipality that wants to

¹ M. Mancini, *Atti del Convegno dell'Istituto di ricerca sulla formazione intervento a Sperlonga*, 2003

become head of the Public Relations Office (URP) and to do it, enrolls himself in a certification course, knows he has to learn new knowledge.

Usually, in these cases, a trainer studies the knowledge and skills gap between person and role and designs a knowledge transferring program and some exercises to train and practice new skills in a expressly equipped classroom.

The methodology suggests instead to ideally put people in the new role, and in this condition, it asks them to plan useful changes for the organization within there is that role, thus exercising that part of role which concerns the responsibility of improvements within a real organizational condition.

Immediately playing the new role and even in the situation to design a concrete improvement in a real context, directly engages people to understand how to be able to play the role. Solving a problem that haunts us, leads us surely to get a move on learning the way it can be resolved. Even better if you have a method to deal with it.

It is sure that the motivation must be strong, that the effort must be temporally restrained because the result has to be seen soon.

Of course, along the planning process given to the person, it is planned to facilitate the acquisition of the required knowledge, through a specific path that runs parallel to the planning process. Knowledge, in this case, must be offered with attention and little by little and, above all, we must teach people to search them directly from the most competent sources. On the other hand, the exercise of competence is more directly connected to the realization of the project assigned to the person. Here the skills are of various kinds. They are partly technical and related specifically to the "task"; and partly they are relational and relate more properly the "role". The decision to implement the project for a real structure that has a real interest in the arrival solution is surely a necessary prerequisite to check the content ability (the task) and the relational one (the role).

The child who does research on his territory has an incentive for his efforts if, at the end of his research, may present the fruit of his work to the parents

community who will hear him together with his young colleagues. In some projects, the research has led to drawings representing a feature of the territory and of its history. They have been later translated into a marble or bronze work to give more importance to the creative work of young people and to involve more effectively the educational community around them.

The Educational Science Faculty student will be encouraged to implement a training project for an organization or a territory which need to train their staff or their citizens. The technician who has to become "head", will be encouraged to design a management program for the staff of the organization in which it is intended. The officer who has to become URP responsible will be interested in designing a communication plan for the citizens.

Each of them will learn knowledge about the issues of the destination role and thus respectively: citizenship, training, staff management, communication, but all of them will also learn the way to realize a research project, a training plan, a management system, a communication plan within the environment in which they live or they plan to enter or operate.

2.2. The organization

Sometimes the change concerns an organization or parts of it. A company operating in a national market with a single product wants to get into a bigger market, international, with a wider range of products, changes its role and must change its structure, culture, management, communication, as well as production technology².

A municipality that wants add a new service or change the way it gives to people a service already in place, must undertake a change process that embraces a wide group of people, all those involved directly and indirectly by the change to be pursued³.

²R. Di Gregorio, *Il caso Alcantara*, in "La formazione-intervento nelle organizzazioni", Guerini & Ass, Milano 1996

³R. Di Gregorio, *Il caso del SUAP*, Quaderni di management, 2003

Production and service organizations, public and private ones, they are "open systems" that structure their organization according to the need to match the framework changes. This flexibility is the result of management. It must constantly negotiate with those who, within the organization, think as if they were in a closed system, centered around the so-called "technical core", that oversees the production process and thinks that it should remain, as long as possible as it is, as if it never had to be changed (see: Thompson⁴).

We believe that the environment urges all roles in the organization, those who hold institutional and management roles, but even those operating in the so-called "technical core". The roles are played by people who, as such, have, in our view, ability to listen, interpret, design and propose innovations, by participating in the organization life.

Of course, responsibilities, as well as capabilities and expertise, experiences and resources availability that everyone is able to bring to table, change. A tasks and responsibilities division is therefore appropriate and it is physiological and natural, but in each person playing a specific role, there is a component of present management and a capacity and potential for innovation to ensure the future.

This does not mean that people who have innovation capacity are placed in those roles and those ones having not are left in purely operational roles, whose tasks are structured by the first ones. We will come back, in this case, to a Tayloristic conception of work⁵, relegating the responsibilities of innovation in the so called "techno structure"⁶.

What we aim to encourage in organizations is to build the needed conditions to perform the planning skills of each person, regardless of role covered.

Innovation is set up as a competence serving the organization to facilitate its evolution and its own life and not as a competence of a part of the

⁴J. D. Thompson , *L'azione organizzativa*, ISEDI, Torino 1987

⁵F. Taylor, *L'organizzazione scientifica del lavoro*, Etas Kompass, 1947

⁶E. Mintzberg, *La progettazione dell'organizzazione aziendale*, il Mulino, Bologna 1985

organization that concentrates in itself this function, depriving the rest of it of the opportunity to express it.

Even the so-called "techno structure" takes on another meaning. It may serve to feed innovation and not only in the organization, just think to the role of information technology in the change processes in public administration.

Even in the case where the methodology is applied to one of the change and innovation reasons in the organization, planning is used. In this case, people are engaged in a project concerning the organization they work at (employee), or the organization they work for (consultant).

The program takes the form of an organizational development project, but it certainly has an impact on internal staff training, taking on another role, that one of change co-planner, at least for the issues assigned to everyone.

The commitment to become "change planner" for the people involved in "Formazione-intervento" programs enables them to participate in planning a new situation that they helped to identify and develop. The planning process becomes, moreover, an effective system to understand the reasons leading the organization to change and so to justify any change of their own role within it.

2.3. The territory

Sometimes the change concerns all organizations existing in a specific territory. The "Territory" is a well geographically and morphologically identified area, in which the community has built distinctive conditions of organized life. Often the borders of this area are bureaucratically identified (municipalities, union and associations of municipalities, provinces, regions). Sometimes it is marked by customs, language, habits, sometimes it can be identified by the economical, historical, cultural terms settled over time.

The territory, in this way, exceeds the conception that considered it as "an abstract space in standard microeconomic theory or a mere container for factors and economic phenomena (of some part of macroeconomics)", and

takes the form of "an active, concrete, relational, vital space, giving roots to its own development processes"⁷.

A space creating an integrated development and attracting public funding, to make available for such development. A development whose success depends "not only on isolated spirits and entrepreneurial talents", but also on the quality of the social and institutional framework, particularly on the efficiency and effectiveness of intermediate institutions and on the intensity of formal and tacit relationships among actors. In other words, from social capital (trust, reciprocity, cooperation, reputation) feeding the heritage of noncommercial interdependencies and trust relationships among individuals⁸." The territory, however, as any other organizations, suffers from Taylor's approach on roles. Within it, there are sub-functional organizations. There are those producing (the so-called technical core), those financing, those creating development strategies and making agreements and alliances (the strategic part of the organization), those promoting innovation and those involved in training and education for all ages.

Even here so, the ruling imperative is the "division of labor": everyone does his job! All these organizations work in part for the reference market, sometimes even international, but certainly all have a common part of their task environment: the citizen. For the part of concern, each one has some workers (another component of the task environment) who are firstly citizens. For the territory / organization therefore, the same reasoning applies; someone separates skills and centralizes the responsibility of innovation while Formazione-intervento tries to bring together and integrate skills and to animate innovation, that is potentially present in each citizen. It tries to find adequate forms of unification and organized channeling of this available energy, in order to make it express all its change power. Indeed, while the organizations of the territory look for hierarchical forms of division of work, Formazione-intervento looks for forms of inter-institutional cooperation and

⁷D. Cersosimo, *Il territorio come risorsa*, Quaderni Formez 1, Ed. Donzelli Roma 2000

⁸A. Mutti, *Capitale sociale e sviluppo, La fiducia come risorsa*, il Mulino, Bologna 1998

promotion and solicitation systems for a widespread planning, which is also channeled towards strategic and collectively shared aims.

"Formazione-intervento" tries to activate a process of inter institutional strategic sharing, that interprets the strategic intents and, taking into account the local social feasibility, that is a long-term planning. Within this shared space, it is possible to develop an inter-organizational planning between institutions and an active participation of citizens, needed for its contribution to achieve the known goals.

The planning should however be acted in the face of a development strategy, preventively shared by the actors that constitute the "social territory" and that are responsible for the animation actions.

In this third case, the methodology engages people in the realization of a project involving at once: their role, the organization where they exercise it, the relationships between the various organizations to which they belong.

Experience shows that it is possible to start from a broad-based strategic choice, which moves from the needs of the territory and helps to choose the strategic projects to accomplish, for which then look for financings. It is possible even to start from a financed project requested by actors which are external to the organizations of a territory, in order to create after, around this first experience, the indispensable culture and confidence to realize stronger structures for inter-institutional cooperation. Then these structures will active a range of shared projects, to be implemented with the same participatory methodology.

Looking more closely a territory delimited by institutional boundaries (municipality, province, region), you can see that there are in it, and often straddling themselves, some areas characterized by culture, traditions, environment, production, language, attractiveness, etc. They are known as ABD (Distinctive Business Areas), as if they were divisions of a hypothetical territorial organization⁹. In this sense, the territorial organization assumes a configuration similar to a divisional company. It is based on the services

⁹R. Di Gregorio, *L'Organizzazione territoriale*, ed. Guerini e Ass., Milano 2010

common in all the divisions, structured with the economy of scale and functional specialization logic, and then has a series of divisions, as many as the territorial distinctive business areas¹⁰.

The process of change that must be done is complex because it's difficult to put together organizations from different fields, as if they were "functions" of the same organization, to achieve a common goal. Furthermore in this case you do not have any integration mechanisms, typical of the companies, firstly: the hierarchy.

To some extent, however, this condition makes easier the use of the methodology, since the planning is a facilitating condition of aggregation. The project has a given time, we know beforehand the aim, it has a realization plan, defined by resources and deadlines and this is reassuring. It needs a good project leader who anyway, by his technical nature, does not fear so much the playing powers. The process that the methodology activates instead, turns, along it, the structured operational conditions and the learning, which it develops in all the stakeholders involved, becomes the organizational link which connects the different parts of this new body, so better than any organizational regulations. In the 70's, the purpose of integration between different organizations was aimed at finding better work conditions; nowadays, in the case of the construction of Territorial Organization, the objective is the welfare of citizens, but the methodological mechanisms to use seem quite similar and can be represented with two words: planning and learning.

In conclusion, in all the three intervention levels (person/role, organization, territory) there is a common goal: learning a new knowledge and a new skill, but also learning about our own learning system. What changes are the purposes of learning and the level where this develops. However, it remains unchanged the intervention methodology. Indeed, although at different times and with different structures, it is always wise to formulate a strategy, share it with reference context stakeholders, define a goal and develop a project to realize the defined strategy, communicate its development and measure the

¹⁰R. Di Gregorio, *Il territorio come organizzazione*, Sistemi & Impresa, N°8 ottobre 2007

learning of people participating and the effectiveness of the learning system used. It is therefore appropriate to dwell on the basic methodology and deepen the ways by which each of its stages is developed. We will do it in the next chapter.

Chap. III - The steps of the methodology

"Formazione-intervento®" is composed of:

1. Strategic formulation
2. Strategic sharing
3. Participatory planning
4. Integrated communication
5. Learning

If a person, an organization, a territory should change or should learn or both, it's important to define the change goal, the learning aim and also the strategy by which we expect to change and / or to learn. The methodology suggests formulating a strategy and a goal to be pursued and formalize everything, in order to have it clear in front of us, so that we will also be able to communicate it to others (**strategic formulation**). It is even true that the process we activate soon after, could suggest us to correct aims and strategy (strategy in action), but that's why, it is good to remember where we started and learn how to redefine aims and to choose the right paths to achieve them. The determination of a goal and the choice of a strategy to pursue it, or vice versa, can be determined by a person, an organization or a territory, but they must always be shared by the context in which the three entities move (**strategic sharing**).

Those who share the goals to be pursued, the methods we intend to use and are willing to participate in Formazione-intervento training programs and in the consequent projects implementation, must then be enabled to exercise this function. The path they will then walk must involve at least the surrounding context, previously activated by the strategic sharing (**participatory planning**).

Planning is "participatory" when it involves people that the project brings into play. This is what distinguishes it from research, which is often unbeknown to

the research subjects. Involve people is the result of a specific intent. To encourage participation must be also developed a complex system of communication between the person and those surrounding him; among people working on the same project; among participants in different projects; among them and the people who belong to the framework for action (**integrated communication**).

Combining the processes of strategic formulation, strategic sharing, participatory planning and integrated communication, we will develop learning processes in individuals, in organizations and in the territories. They constitute a heritage, when reflectiveness, suitably activated around them, develops awareness as to transform the pre-existing culture (**learning**).

In fact, as stated by Schein, it is that culture that will be the leadership reference to allow it to indicate the best way¹¹.

What we will discuss below is the Formazione-intervento methodology, as a path to follow in order to plan and learn, as a set of tools to use and techniques to be used in order to be able to achieve learning and change in people, organizations, territories.

3.1. Strategic formulation

Strategic formulation is a process suggested to a person, an organization or a territory, when they decide to learn and / or to change themselves to face a novelty, to realize an innovation.

Often people participate in a training activity, they face a change or are driven to do it, without having reflected on the aim to be achieved, on the way to pursue it, on the results that count to acquire. This creates then some disappointment and sometimes it is a cause of some conflict with the closest people.

People leading organizations, willing to set up new organizations or to transform them, are not always careful to formalize the strategies they pursue, to illustrate them to those who should share them. This creates

¹¹E. Schein, *Cultura d'impresa e leadership*, 1990

misunderstandings with those who are object of these strategies and who could even help them in pursuing the aim.

Policy makers in territories, even small, are not always inclined to illustrate their pursued strategies of services improvement or local sustainable development, which are the two fundamental missions of a local authority. Some of them try to formalize the so-called "political plan" at the time of the election, but it is unlikely that such an effort will be then constantly updated and widespread communicated

The methodology suggests instead formulating and formalizing the learning strategy that we want to mature or the change strategy to be pursued and to constantly actualize its contents.

A person, who wants to start a training program for a new role, should clarify to himself why he takes this commitment, what he will be happy to achieve, by what method he wants to achieve its purpose, with which companions he will walk on the path, at what cost he is available to achieve it, with who he will share his choice.

An organization, that wants to change its action strategy in the reference framework, should formalize its decision so that its staff will know why and how they must change their role behaviors or even the roles and systems that characterize the organization itself, to be in line with the new directions outlined.

In the same way, an organization should represent its new strategy to the context in which it operates, even though in a different way and differently for each of its stakeholders. "Stakeholders", composing its "task environment", are entitled to know the strategic changing of the organization with which they have a relationship, in order to decide to change, in time, the content of their relationship. Customers, particularly, have the right to know the pursued strategies of the organization from which they are buying from, because the relationship does not always end in a technical or economic exchange, but also brings into play the values of the choices carried out.

Just think to buyers that exclude eggs purchasing from organizations declaring: "Cage rearing".

A territory willing to pursue a local development new strategy should formalize the reason for this choice, the time it will take to get the first results, the resources it will need, the structures to be used and inform all citizens in order to share with them the choices. A territory does not have a head as in the case of an organization. You cannot even identify the head with a person that brings into play what he is, valid in itself. This means that for the territory, even more than in the other two cases (individual and organization), we should formulate a strategy shared by all the existing actors and formalize it in a policy document.

This exercise is useful in order to be provided with a line with regard to which orientate ourselves and it's useful to those who draws this line, but also to those who must follow, evaluate, adapt, accept it, together with other aspects defining the relationship. Therefore it must be formulated and formalized to be presented then, negotiated and shared with the framework stakeholders.

When you activate a Formazione-intervento program that involves people, the strategic formulation about the training program to be activated and the goals to be achieved are generally formalized by the providing structure. This is useful to declare the characteristics of the program that it offers to potential customers. These, in their turn, choose to join the program if their strategic formulation (what they want to learn and what they want to become) finds a positive answer while reading the proposal.

Often it is the funding organization that expresses a strategy and provides for its implementation the necessary economic resources. In this case, negotiation happens on two levels: one that occurs between the funding body and the Formazione-intervento planner and another one that occurs between the planner and the potential users of the training program to be realized.

In any case, where a Formazione-intervento program starts, there will be a need to formulate a training strategy and to use its formalization to share it with people who are potentially interested in taking part of it.

When the Formazione-intervento program is about person, the consultant/methodologist expresses the training strategy that wants to pursue and tries to enable participants to express the strategy that pushes them to participate. He will work then to enable each one of the participants to express the reasons that led them to change. Then he will try to identify everyone's personal and behavioural characteristics. He will so bear well in mind them during the management of the program that he will activate.

When a Formazione-intervento program involving an organization is activated, the consultant/methodologist must formulate a persuasive action strategy, in order to allow that its consultancy proposal will be accepted by the management. Conversely, the management of the organization must formulate its change strategy, so as to choose the internal staff to pursue it and the external consultant/methodologist who could help the internal staff to pursue it.

In the case where the strategy to be pursued has not been formalized, it is a good rule to engage ourselves to do it and it is one of the initial and indispensable actions. This should be done by internal staff, which has to manage the change, supported by the consultant/methodologist, that has to intervene alongside the management of the organization.

This work serves to clarify and formalize the goals of change to be achieved and to clarify the commitment that you ask to who will develop the project and to all the others that the project will involve.

When the program concerns a number of organizations belonging to the same territory, the strategic formulation process must be conducted with all the people playing a leadership role inside them, before decreasing to lower levels, to involve all citizens finally.

The strategic aims must be formulated so that they can be transmitted, discussed and shared by the single person that triggers a learning or change process, by the people belonging to an organization or more organizations of the same territory.

The strategic formulation requires a serious thought and its formalization requires a planning process that may request several development stages and a targeted research.

When you plan to make some people acquire new knowledge, you must run an analysis about the already held knowledge and about those ones that they or the framework consider necessary. This analysis, combined with that one about people's motivations to learn, leads to delineate the so-called "training need" which is the basis to plan the training to be carried out.

When you want to ensure that some people are adequate to play a particular role, you must run an analysis that serves to identify the difference between the characteristics that people must express in this role (characteristics, knowledge, skills, motivations, values) and those ones already held by people willing to play it (internal or external selection). This analysis gives the possibility to outline an adjustment strategy that must be properly formalized, before it is declared in public. The route is known and well documented, especially by the publications concerning the vocational or management training field.

When you intend to ensure that an organization changes profoundly, it means that you did an analysis about the services it provides and the situation of its operating framework (laws, customers, competitors, etc.). Moreover you had identified a persuasive change strategy.

Also in this case, it is worth to formalize this strategy, before opening it to the public within and outside organizational boundaries. The route is known and well documented by scholars and consultants who deal with organizational development.

Igor H. Ansoff¹², about strategic choices, offers an interesting model in which he distinguishes between three alternatives:

- budgetary behaviour, which does not include a strategic change;
- the strategic adjustment, which means moving within the strategic trajectory previously pursued;

¹²H. I. Ansoff, *Management strategico*, Etas, Milano 1980

- the strategic discontinuity, which breaks up with past experience;

The last choice depends frequently by a change in power. This, in its turn, is activated by the *"potential of influence" which consists of the boost forces that influence the behaviors choice*. They are: the results aspirations, the cultural aspirations, the power structure and strategic leadership.

In local authorities, the potential of influence it is activated, in theory, every time you go to the elections to renew the political leadership. The new leadership is the bearer of innovative ideas, pushed by a different culture from that one in power and from aspirations developed into contact with potential voters.

The problem is, however, to make compatible what the innovative boost is potentially able to express and the previously established power represented by the existing structure.

The clash that may occur in this situation is - as Stanley Davis says – that one coming from the difference between the leading ideas and the daily ideas¹³. It leads to change people, systems and structures to achieve different results.

In Public Administration, it is quite difficult to change people and replace systems. Firstly, this difficulty depends on employment contracts rigidity. On the other hand, it depends on the available resources, usually poor.

That's why it is so important, in this framework, to use a participation process. In this way, it is easier to share with the leaders of these structures, the opportunity to adopt a more democratic approach to the organization management, so that it would be possible to improve the provided services and support local development.

When you intend to increase the visibility of a territory and its attractiveness, you must run an analysis on the current situation and try to find a change strategy by creating a combination of the already explicit vocation and the strategic insight. At this stage you go find the "spirit of the place" (genius loci) and you approach it with the desire of discovery. You need also love and respect for a reality that, full of treasures of its life lived, shows itself to those

¹³S. Davis, *Interpretare il mutamento*, IPSOA 1979

who want to see and that is capable of evoking what a good researcher feels, as well as he sees.

Quoting Musil:

"If there is a sense of reality, and no one will doubt that its existence is proved, then there must also be something we can call sense of possibility. Whoever has it does not say, for instance: here this or that happened, will happen, must happen; but he imagines: here this or that might or could happen. If he is told that something is the way it is, he will think: Well, it could probably even be different. So that the sense of possibility could be defined also as the ability to conceive everything that there might be; the ability to not attach greater importance to what it is, than to what it is not (...) A fire, a soaring, a readiness to build and a conscious utopianism that does not shrink from reality but sees it as a project, something yet to be invented"¹⁴.

The analysis is useful, but not sufficient. It goes straight and slowly, driven by the strategic hypothesis that is progressively matured in the mind of the consultant and of his interlocutor, until it overtakes them. Then it will lead the analysis to find out what it is needed to prove the goodness of the strategic intuition.

In strategic formulation the combination between utopia and reality, emotion and reason, subjectivity and objectivity, innovation and habit, dream and substance, should be handled with care and understanding, but it must anyway always be accepted and respected, remembering that someone as Nelson Goodman said: *"the reality is created, is not found"*¹⁵.

After formulating the strategy, it must be formalized properly.

The formalization should be done in such a way that it can be easy to use and it can be customized by the roles to which it is then presented.

It is also a way to take the responsibility for a choice, to compromise ourselves. Quoting Gothe:

¹⁴R. Musil, *L'uomo senza qualità*, Einaudi, Torino 1962, p. 12

¹⁵N. Goodman, *Vedere e costruire il mondo*, Laterza, Roma-Bari, 1988

"Until someone is not compromised, there is hesitancy, the chance to go back and always ineffectiveness. Concerning all acts of initiative (and creation), there is just one elementary truth, ignoring it kills countless ideas and splendid plans. In the moment that someone definitely compromises himself, then Providence moves too. All sorts of things occur to help things that never otherwise wouldn't have occurred. A stream of events starts from the decision. It makes happen in our favour all manner of unforeseen incidents, meetings and material assistance, which no one could have dreamed would happen in this way. Whatever you can do, or dream you could do, just begin it. Courage has in itself genius, power and magic. Begin it now."¹⁶

The formulation of a strategy is the result of a learning process that persons, organizations or territories mature and which then leads to a consequent formalization.

In the case that, to do this, you use a Formazione-intervento methodologist, he will also have the duty and the responsibility to let you dream a change and to instill, in those asking for his support, the courage to start it.

The formalization of the strategy also serves to collect within themselves, within the organization or the territory, the appropriate indications to enrich and optimize the strategic decision to be pursued.

The strategic formulation is also needed to prepare the environment, in which the person, the organization or the territory are located, to follow the change process that Formazione-intervento will trigger and to prepare its own change. The formulation of the strategy is a very effective learning process for those pursuing it, especially if it is facilitated by a consultant's contribution.

The confrontation between developer/client and consultant and the need to formalize the outcome of their debate is indeed a good tool to raise consciousness of the strategy to be pursued, in order to make it own, after the necessary adjustments coming from the mutual contributions.

The path is a way in which both bring into play their skills and experiences, compare their cultures, languages and visions, negotiate solutions. Learning

¹⁶W. J. Goethe, // *Faust*, ed. Feltrinelli 1965

is mutual and both get out of the way together done, certainly enriched, if the exchange has taken place, the relationship and trust were well-established, the hope has been strengthened, the objective, which is expected to achieve together, is clearer.

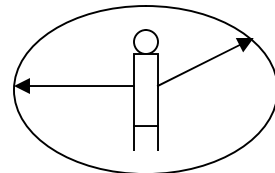
The trip may seem linear and almost banal, but every step to walk requires to the involved consultant a deep preparation, a considerable negotiating skill, a systemic and strategic vision, a good political management skill of complex relationships.

3.2. Strategic sharing

The strategic sharing is a process that a person, an organization or a territory must develop with regard to their framework, when they decide to change.

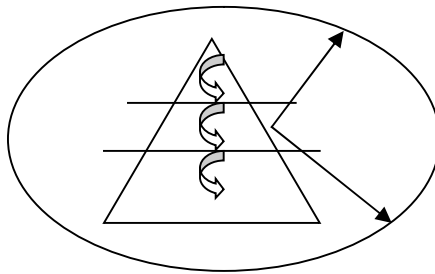
The strategic sharing must be developed by persons with regard to their emotional and social framework. Indeed, although the framework has contributed in some measure to the choice (strategic formulation), it has also to share its consequences, deepening the future change awareness and the new role that will be requested to each of its components.

The young graduate who intends to attend a master abroad to enhance his skills has to share this strategy with the affection world around him and the family background that provides him with economic resources needed to pursue his plan (circular sharing).



The grade school student attending a Formazione-intervento program to learn more about its territory must, along with his teachers, share with parents and local administrators that this does not mean taking time to lessons and use it to have fun.

The management of an organization must also develop a similar process with regard to its staff and its stakeholders. The strategic sharing must be developed differently, depending on the different roles of the internal structure (vertical sharing) and on the different interests of each kind of interlocutor (fan sharing).



For this purpose, it is essential to use communication. Indeed, it allows clarifying, within the organization, the change choice that management intends to pursue. It also serves to indicate to external stakeholders the new strategic identity that you want to assume, in order to create wait and expectations. These will induce the external environment to press on the inside one, in order to support the change action taken inside¹⁷.

The strategic sharing within organizations serves to illustrate the strategies, to animate a constructive debate about their pursuit, to identify projects which permit their pursuit, to gain candidatures from people willing to grapple with the following phase, that one of participatory planning.

When working on a project in an organization, all the working people have the right to know the direction in which change will move, so that they can facilitate the adaptation of the organization and prepare themselves in time for the following roles changes.

Chandler¹⁸, describing the US companies' development process, during the early twentieth century, reported that there was a constant delay of

¹⁷V. Coda, *Strategie d'impresa e strategie di comunicazione: il legame mancante*, Relazione al seminario, Università Bocconi, Milano 1989

¹⁸A. D. Chandler, *Strategie e strutture nella storia della grande azienda americana*, F. Angeli 1976

organizations in adjusting the strategic plan to environment changes and even further in adapting internal skills. The following effort, done by management training, has moved forward the skills, but then registering a difficulty in the rapidity to develop the strategic plan.

The lesson we learn is that reading the framework evolution in which the organization operates is critical to draw successful strategic projects and that constantly strengthening the skills serves to read properly the framework and, at the same time, to do practicable strategic projects.

The novelty of Formazione-intervento is that the entire structure is drawn to read the market and framework variables, and to share the need to formulate strategies and improvement projects, as a "practice" procedure and not as an exceptional condition. Another important aspect to note is that, if everyone is drawn to think constant innovation, this principle does not overturn the organization, but it forces everyone having different responsibilities in roles, to fulfil his own tasks and to contend himself with the rest of the structure.

The strategic sharing is even more important when the management intends to embark a participative course and when it intends to develop the change designing as an opportunity to learn for people and for organization.

It is therefore developed on the basis of the document where strategies were formalized, strategic projects to be activated have been indicated, and methodology by which we intend to involve staff in the organizational change process has been explained.

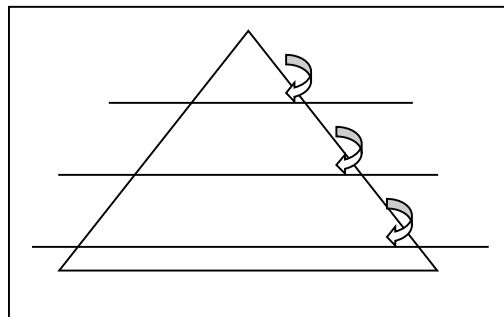
Strategic sharing in organizations takes place usually through workshops properly designed for different levels of responsibilities, in which it is presented and discussed the strategic document prepared during the strategic formulation.

If the program concerns a wide organization, levels of dialogue will increase and the number of workshops will be increased accordingly.

When strategic sharing is done in such an organization, the management engages the structure immediately below it and with it the next level.

Later, the involved level carries out, for the staff working for it, the same role that it saw the management play and activates the strategic sharing that has already taken on board in the previous meeting.

When the program involves a wide organization with a large hierarchical-functional structure, the strategic sharing must be done by organizational levels with a homogeneous hierarchy. At each level, the strategy needs to be illustrated and should be debated in a different way, because the aim to be pursued with each level is different, due to the different role responsibilities of the belonging hierarchical level.



In Public Administration normally you will come across at least five different organizational levels:

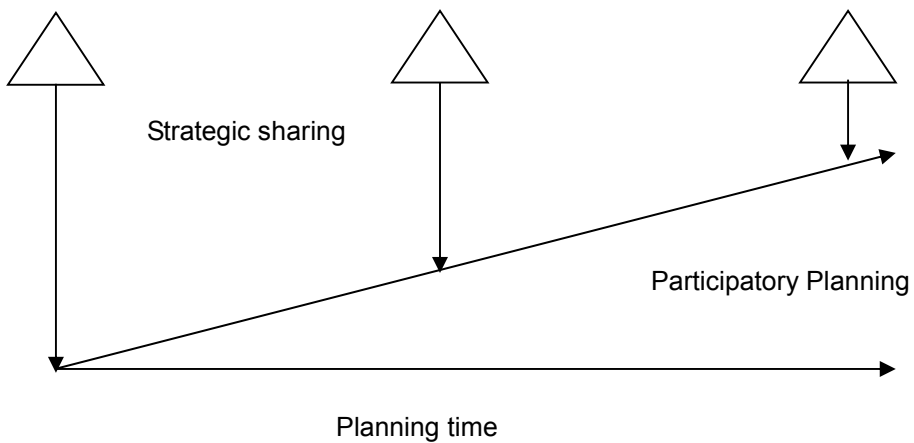
- the political/strategic level, composed of local administrators;
- the political/institutional level, composed of representatives of the citizens;
- the management level, composed of the management of the different functional areas;
- the level of officers or technicians, composed of staff performing specific functional activities;
- the operating level, composed by staff performing work with less procedural responsibility.

It is clear that the political management strategy is formalized and communicated in different ways, depending on the role to which it is proposed and this is because:

- with the first level, you have to share the basic choices and the relevant strategic trajectories, but also the way in which every member of that level plans to share them with the underlying levels;
- with the second level, you have to indicate the strategic choices, along with the value that they have for the entire population they are responsible for, as its representatives (those who are in government and those who are in opposition);
- with the third level, you have to share the organizational, operational and economic feasibility of strategic choices largely defined, but susceptible to adjustments in the aims and in the timing of implementation. With this level is then necessary to share the choice of the people who will be part of the working groups on projects that will make practicable the strategy;
- with the fourth level, you have to share the fundamental choices, the culture under the strategic choices and the new identity of the institution. The formalization of the strategy serves to motivate people to adhere to invitations to participate in project teams that will be right after constituted;
- with the fifth level, you have to share the basic culture that drives the institution new way of being and pushes the political and managerial leadership to develop strategic projects to which everybody must contribute. At this level it is important to dwell on the relationship between strategy and organizational behaviors, between real and formal communication, between strategic and day by day improvements.

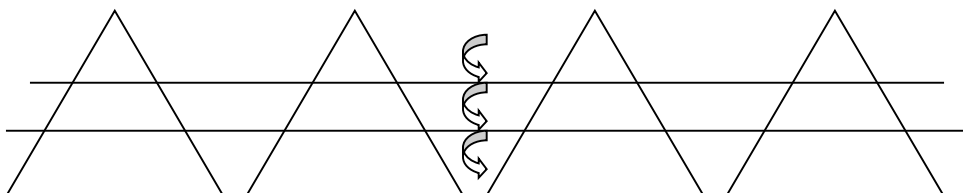
In some cases, the Formazione-intervento process is not so linear and does not proceed directly with vertical mode (top-down). There are indeed cases where the leadership is "pulled" into the process by the consultant he chose. Which is why the strategic sharing that the management activates in regard to levels underneath becomes an opportunity to consolidate within itself the strategic ideas to illustrate and the methodology used to achieve them.

There are other cases in which the program was due to the publication of a funding notice and the initial action of strategic formulation with the leaderships of the involved organizations was not sufficient to make them real and persuaded sponsors of the initiative. In these cases, the consultant has to care of activating the sharing strategic in order to conquer the leadership. Then he has to repeat the action several times during the participatory planning process activated with the internal staff of the organization, so as to be able to make it involved and drive it to the first reason of its planning.



In this case, the strategic sharing becomes a training process for the leadership, although indirect, and a way to reassure staff that plans, about the interest of the leadership in its work and its commitment.

The same applies to the organization/territory. It has to engage similar roles although belonging to different organizations (inter-institutional sharing).



When more organizations of the same territory decide to pursue a common change strategy, it must be developed a strategic sharing process involving progressively, with a top-down mode, people playing the same role in all the organizations. It should also be developed a bottom-up consultation process that enables debate about the acceptable and therefore to be pursued changes.

When you want to define a territory in order to initiate the establishment of a Territorial Organization, before you must establish an association among municipalities defining a distinctive area. In this case, the strategic formulation defines the reasons that suggest the creation of the association and normally gives rise to a memorandum of understanding which should be approved by all the political representative forces in each of the participating municipalities. To approve the memorandum, you will need several preparatory meetings where the subject to discuss is the strategy suggesting the aggregation and the autonomy anyway left to the individual members.

When this stage is finished, you have to build integration systems among the management structures working for the political one. In this case, the strategic sharing must before be developed inside of each municipality, and then among all of the substructures exercising the same function in each municipality. The first operation is quite easy, because it concerns roles vertically arranged and there is therefore a recognized leadership involving levels working for it. The second one is more complex because it cannot count on a hierarchical role and should only be based on a personal or technical leadership. In both cases, the leaderships must act on the element of "convenience". They must obtain a support about the profound changes asked to people who, while remaining in a functional role within a hierarchical/functional structure, have to start to play organizational behaviors typical of a "network", where transversal collaboration among people playing the same role in different municipalities is prevalent.

Probably there was collaboration as well before, but it was voluntary and based on the relationships among people. In other cases, it is possible there was competition and even resentments caused by different reasons. In both cases, the "network" requires an organizational behavior overcoming personal relationships and individual motivations. Precisely for this reason, the leader initiating the strategic sharing process must explain effectively the advantage that each one of the "network" members acquires in the new organizational situation and the autonomy that he still retains in his role in the belonging structure.

In a territory, the change is invoked by many, but it is difficult to implement if there is no leader who takes it upon himself. Firstly, this leader has to convince about the necessary change the organizations of his own sector (function) and then, thanks to this, the other organizations part of other functional areas.

To take the example of the tourism sector, it is clear that the first thing to do is to tighten in a first network of municipalities surrounding an attractive area for tourism because of its intrinsic meaning for some targets. The second thing, immediately following, is to co-opt in this first network, the other one involving tourism companies, in order to decide an offer consistent with the expectations of the target that you want to attract, in order to satisfy a mutual benefit.

In this case, the same considerations made above are valid: you have to make a strategic sharing process showing how as the sum of the "network" benefits overcome the disadvantages of a lower individual autonomy.

This task is sometimes assumed by a Public Administrator who plays fully and courageously the institutional role belonging to him and becomes a change promoter, firstly towards the other Administrators of the area surrounding his one.

Other times this role is assumed by an entrepreneur that. He looks to his business interests, but he is also driven by social values leading him to take care of his community welfare. So he becomes responsible for collecting other

entrepreneurs, in order to gain the strength to define a change and enable a sharing process involving progressively also organizations in other functional areas of the organization/territory.

In both cases, the experience suggests to develop the strategic sharing firstly within his sector, for all similar organizations that belong to it, and then within the organizations of the other sectors, after you have carried out a cross sharing preparatory work on the management of the organizations in other sectors, taken one by one.

Essentially this type of sharing takes place through the following steps:

1. Internal phase within leader's organization
2. Internal phase within leader's functional sector, beginning from the management of the organizations
3. External phase in order to co-opt the management of organizations belonging to a different sector
4. Internal phase within the organizations of the co-opted sector
5. External phase gradually dedicated to other sectors
6. Final phase carried out with all the organization's management of all the sectors of the organization/territory.

In some cases, you can also find a leader coming from outside the territory, who has the motivation and the expertise to enable the above described process by helping the leader to play his role and to hold up the complex sharing process within same sector organizations and within organizations of all the sectors the organization/territory is articulated.

When strategic sharing concerns the "person", it seems easier. It is in fact made by the person who intends to carry out a change on himself, and at the same time on the context in which he lives or he wants to operate.

Actually also this type of sharing presents some difficulties. Precisely because the action involves people very close to him, it is less objective and more charged with emotional effects.

The young man who, to learn something about himself, chooses to make a "journey" and to reach Santiago de Compostela, along hundreds of kilometers

on foot, must share that choice with his family, with the person he loves, with friends dear to him, with colleagues, with members of the associations he belongs. He must do it simply because he will deprive everyone of his presence for a period of time, but, more deeply, because he is already changing and when he will return he will certainly be different.

The strategic sharing made in any of the three levels considered (organization, territory, person) is always a learning process focused on the change defined by a new self strategy.

If, instead of being treated as a communication or negotiation, it is interpreted and lived in the way we described, already in itself generates change, because it develops new learning.

Sharing the reasons for change among those who want to pursue it and those who have to share it, is a matter of discussion, challenges the existing balance, reactivates the need for knowledge, urges our learning structure to learn new things and new ways of learn.

Of course, greater is our conviction that this should happen and it's an opportunity, greater must be the expertise that we have to use in order to make this sharing process a learning process. As such, it should be carefully planned, but even more skillfully managed.

3.3. Participatory planning

"...He or she who abandons a project before starting it...dies slowly"

(Pablo Neruda, Die Slowly)

Learning while changing and changing while learning are two sides of the same coin, which has a common basic material: planning!

Planning is needed to change, but also to learn.

The planning effort and the tension towards the goal call for the need to understand, to seek, to gather information, to know, to confront and therefore to learn.

We believe that this is true for any subject about which you want to develop learning or you want to make a change.

If we want to use the participatory planning to develop learning, we will use those particular professional requirements for leading people in developing a proper learning, properly using this methodology. These professional requirements are those of the methodologist and of the process consultant that sometimes helps him.

So, if a person intends to learn to exercise a different role, he will be given the chance to develop a project inherent to the role that he wants to play, in a real condition, in the presence of stakeholders who are part of the framework. If this process is developed by a single person, it is similar to that one of coaching. Usually this need is expressed, however, by a group of persons and in this case it's more similar to a traditional training program. The difference is that in this case the program revolves around a process based on a project. It is the typical case of master's degree, where you define upstream a destination role (example: the tourism expert), you agree on the aim of developing a specific project in some geographical areas, that only a tourism expert would know how to develop (example: to build an archaeological tourism project for high school students), you entrust to each participant the aim to be pursued and the customer to be pleased and you follow the neo-planner while realizing all the project development phases.

This exercise feeds the need to learn the basics you need to make a good project, and then enable the person to understand how to perform the role and what concepts he should acquire, using what the program offers him, but also what the framework can give and, in general, the literature and the experts deployed in the world can provide, if properly reached and motivated to give some of their knowledge.

Similarly, if an organization wants to improve its functionality because of the framework in which it operates, its internal staff, according to their role, will be induced to develop projects that allow it to change the status quo. In this case, the methodologist will still be critical, but the management of the organization

will have even greater importance, because it is a real and substantial customer of the staff learning and of the project results that the staff will offer to the it in order to change the pre-existent organization. If the management will have also learned that the methodology was helpful, it will be pleased to measure if its staff will also have learned how to learn, and if it will not always need to have a signal from the top to do it.

Also a territory that wants to develop better living conditions or greater attractiveness will be induced to engage people from the organizations operating within it, in inter-institutional projects that allow changing the local context. Unfortunately, in this case you may not rely on an outside customer involved specifically to build a real condition for exercising the role (see: the first case), or on an inside customer, which carries on the management role of the changing organization (see: the second case). The territory has not a management and its customer is implicit, diverse and ever-changing, often generated not only by people but also by the environment and the rest of the living beings.

Therefore, anyone wishing to enable a learning process of a territory by using the Formazione-intervento methodology, must firstly develop a process to transform the several existing organizations in a Territorial Organization, and then activate the participatory planning processes with persons belonging to different organizations to be integrated. In this case, the construction of the Territorial Organization might be the planning aim on which engage people belonging to different organizations, to learn how to exercise the old role, but in a different organizational condition (example: people working in tourism in different organizations, public and private, of the same territory, can be involved in a participatory planning process to define integrated tourism projects suited to specific targets, identified by the preparatory exercise of strategic formulation and strategic sharing).

The planning we are speaking about is a particular planning that cares also for the involved stakeholders learning.

The methodology is based on the concept that changing and learning are not processes involving only persons primarily interested in them, but also those around them, or those that directly or indirectly are involved by the changes made by the first ones. For this belief, it considers important to call in the planning all the people involved by the activated process and help them to develop an effective interaction.

Bruner ranks interaction as one of the nine principles driving the educational approach of cultural psychology: the principle of perspective, the principle of limitations, the principle of constructivism, the principle of interaction, the principle of instrumentalism, the principle of identity and self-esteem, the narrative principle.

Right in line with these principles, it takes shape the process that we called "participatory planning".

The participatory planning is a process developed by a person or by a group following a planning process, involving a growing number of people in order to share their journey, possibly supported by an expert methodologist. It is also used by a community (members of a training program, of an organization, of more organizations of the same territory) to develop a change process or a training process or both.

The recommended planning process follows a path consisting of several sub processes which are below illustrated in a sequential way, but in reality, almost always, are spiral developed, as in the scheme of Kolb¹⁹.

The stages of the participatory planning are:

1. scenario is the first phase to be implemented in order to realize the framework characteristics, the reasons for the efforts to implement the project and the constraints that mark the action. This phase stimulates a global system learning because it induces people to question on how the world works, what laws govern society, in which direction technological innovation is developing, on which economic resources to rely, but also to take a reality check, questioning about what

¹⁹in Quaglino G.P. *Fare Formazione*, il Mulino, Bologna 1985

benefits the involved stakeholders would obtain, what the prevailing difficulties on which rest their projects and what the limits in which contain and finalize them;

2. goal is the starting point for the planning and is the result of a negotiation between those interested in its outcome and the person or persons who have to develop the planning process to pursue it;
3. scheduling is the stage where our own resources are related to the activities that we plan to carry out to develop the entire planning process needed to achieve the goal negotiated. This plan will be constantly remodeled and updated during the planning, according to the conditions that the road shows and the framework allows. This exercise develops a valuable learning about the relationship between dream and reality to be managed, between what I want to do and what I can do, between what I think I can do and what I am able to do. It is an exercise that shapes the self and help us to understand how we are and what is the real power that we have towards the world around us;
4. analysis is a stage used to understand the initial situation and to focus on the critical issues and needs that the planning must meet, but also to verify the practicability conditions to be taken into consideration. In terms of learning, it is an important stimulus to exercise the research skill, dormant after many years of memory and storage teaching;
5. benchmarking is a step used to collect experiences that could suggest project hypothesis or however provide creative ideas to help us to focus on it. It is a stage stimulating our learning system to learn from others, where others are very different from us, but of which the world is rich (humans, animals, plants);
6. pre-planning is a phase where you begin to focus on some preliminary planning alternatives and to verify the willingness of the client to pursue some of them. At this stage, we learn that to solve a problem, there may be different solutions and that the optimal solution

is not only "technical", but often it's that one responding on a social evaluation;

7. planning is the final phase of the planning work. Here it is finally drawn up and formalized the chosen solution and its feasibility conditions, including economic aspects;
8. presentation is the phase where we meet the direct and indirect customers and we negotiate finally the identified solution. It seems to be placed at the end of the process, but it's an action to be developed constantly along the planning process in order to adapt the optimal solution formulation, according to the customers contributions;
9. negotiation is the phase in which the planner meets the client to share the formulated planning solution. Even this is a continuous action, embodied in our own learning process and in that one of others, to be developed along the way;
10. learning is a process running along all the steps above described, made by who develops the process, who is involved directly and indirectly, who is involved intentionally. This process is effective if it is made consciously, through constant and structured observation on how it evolves in us and in others and if it is formalized in its development. In fact, what is asked to participants is to reflect on their own learning constantly, while the process in which they are involved is developed. More specifically, they are asked to use an agenda, a notebook, a small computer, and write while the process and its action are developing, what happens inside their selves, what they feel around them, what happens in the organization in which they live and work. People are invited therefore to exercise a "reflective practice in action" as Donald A. Schon would say²⁰. Indeed, we are normally encouraged to focus on the action and to learn how to carry out the action, rather than on how our mind organizes itself to understand how to carry out the action, how to make sure that our

²⁰D.A. Schon, *Il professionista riflessivo*, Edizioni Dedalo, Bari 1993

mind will acknowledge the basic rules that will then lead the action.
What's important is to stop and reflect on how the mind has learned
the way of learning.

After, it is shown in greater detail each of these phases.