

ADDITIONAL RESOURCES:

training for change

www.trainingforchange.org

online resources and trainings in the tools and techniques of democratic social change

praxis makes perfect

<http://joshuahahnruessell.wordpress.com>

organizing for power, organizing for change

<http://organizingforpower.org>

POSSIBLE MEETING ROLES:

Facilitator

Co-facilitator

Note Taker

Timekeeper

Vibes Watcher

Greeter(s)

Stack Taker

Sign-up Sheet Person

A GOOD MEETING...

... falls in the middle of a longer arc that includes preparation, the meeting, and follow up. these often take equal time, or may be part of a longer term process.

... starts on time and ends appropriately. a good meeting is respectful of people's time AND the group's cultural norms around time.

... has a clear and articulated goal(s) that has been agreed on by the group. a good meeting has an agenda that has been shared with participants in advance, and with which the group has agreed to work. the people who are present are equipped to deal with the content.

... has a facilitator and facilitation team that has been agreed to by the group and in whom the group has trust. The facilitator/team is aware of the history and current climate of the group, and can both pace with the expectations of participants and lead them toward their goals. the facilitator creates a safe climate for participants and stewards the group's process.

... balances the longterm goals of community building, movement building, winning campaigns, dismantling oppressions, bringing about revolution, etc, with the immediate work of the group.

... results in clear action steps and often includes an evaluation, which helps the group develop a culture of reflection and shared responsibility for effective meetings.

A GOOD FACILITATOR...

... can be a member of the group or an outside supporter; each relationship presents challenges and opportunities.

... does her homework. a good facilitator has prepared for a meeting through research, advance one-on-one conversations with participants, and other diagnostic tools.

... is flexible. a good facilitator is prepared to chuck the plan and propose new directions for meetings based on what's actually going on in the room.

... gets permission from the group to make changes to the agenda or agreements of the group (such as extending the meeting an extra ten minutes to accommodate transformative but unexpected conversation).

... is careful about sharing responsibility for the meeting with participants or other members of the facilitation team. she has sought presenters on key topics, enlisted members as note takers, timekeepers, etc, and publicly recognizes the leadership of group members.

... believes in the group's wisdom. a good facilitator knows when not to intervene in the groups work, and when to step in to lift up an observation, synthesize ideas, take the group's temperature, or move the group to action.

... pays attention to participation and power dynamics, and supports non-dominant voices to speak up and be heard. a good facilitator is highly attentive to marginalized voices.

... is transparent about his own use of power, but not afraid of using it for the good of the group. a good facilitator is willing to step out of the role if he wants to weigh in on content.

... is not passive. a good facilitator holds facilitator rank and uses it constructively.

... has her own style. there are many ways to be a good facilitator.

... is not afraid to be unpopular. a good facilitator is willing to challenge the group to do its best work by speaking up if the group is being ineffective, uncooperative, or oppressive.

... will skillfully interrupt participants when needed to support the work of the group.

... understands primary AND secondary group process. a good facilitator knows that often the "real" work of the group happens in the bathroom line, the cigarette break, and the lunch hour, and times content to maximize the benefits of secondary process.

... takes care of himself well. a good facilitator is excellent at self assessment and has a high level of self awareness, which allows him to remain neutral and move the group forward, even during heated moments of strong conflict or when he is challenged by the group.

... has a good toolkit. a good facilitator uses humor, art, physical moment, solo work, small groups, activities, whimsy, and theory to engage all kinds of learners and abilities. a good facilitator is aware that visual, auditory, kinesthetic, and heart/relationship based learning modes must be combined for the best outcomes.

... takes care of her tools. a good facilitator practices tools in low risk environments, and is clear on which tools and working methods best support which outcomes/types of work. she doesn't apply tools willy nilly; she chooses the right tool for the job and knows why.

... a good facilitator is aware of the culture(s) of the group, interlocking oppressions, and specific social context. a good facilitator supports the group to be/become self-aware about how oppression operates within the group, and is transparent about her identity and experience.

... takes responsibility for group process. a good facilitator doesn't make decisions, but makes sure decisions are made. a good facilitator summarizes and synthesizes comments regularly.

... doesn't make assumptions about participant feelings, preferences, etc. but instead notices cues, makes inferences, and tests those inferences with participants (i notice you have your eyes closed. i'm wondering if you are sleepy, and if that means you are not able to stay engaged with the meeting). finally, a good facilitator takes appropriate action based on those tests (i'd like to do a quick physical energizer to wake us up!)

... is intentional about creating an environment that is an ally to the work of the group. lighting, timing, comfort, temperature, distractions, are all considered. a good facilitator also encourages groups to chose environments that are accessible and welcoming to members, which might include providing childcare, meals, transportation vouchers, etc.

... understands the natural laws that govern group behavior and makes choices accordingly. this includes:

- building a "**container**" of safety within which participants are willing to risk over time
- effectively **diagnosing** the energy, emotional state, and needs of the group through visual cues, awareness of underlying dynamics, etc. and testing inferences.
- **sequencing** activities moving into higher risk work as time progresses
- **sequencing** work with awareness of breaks, meals, and other physical rhythms that affect energy and flow
- understanding the developmental cycle of forming, storming, norming, and performing.
- separating different kinds of work to achieve the best results. sharing information, idea generation, evaluating options, proposal making, and decision making are separated by time and space during high stakes sessions to allow people to fully process each stage.
- understanding that groups "breathe" through **integration** (coming together) and **differentiation** (separating). Works with pattern using full & small group work strategically.

... stewards effective evaluation and follow up tasks, including documentation, reflection, sharing and synthesizing notes and decisions, etc.

SOME FACILITATION TOOLS

This list is by no means exhaustive. It is drawn from my own experience, and from the workshops of Dana Kuhnline and Lisa Fithian.

DIAGNOSTIC TOOLS

Clusters/Spectrum

What: Have people move to different places in the room to signal their position on an issue. Interview people about why they are standing where they are standing. Can be agree/disagree spectrum, 2 axes, or centralized clusters (stand close to the reader if true for you).

When: When people are sleepy/disengaged. To make the spread of opinions visible to the whole group. When there is an underlying conflict that needs to come to light.

Why: Sometimes loud voices make it seem like there is more disagreement than there is on an issue. A quick and physical way to take a temperature check. People can move if they are convinced by others, so you can see persuasion happening. Great physical diagnostic tool.

Straw Poll

What: Visual call to see how people feel about an issue – can use Five Finger Shoot, Thumbs up/Thumbs down/Thumbs medium, or Yes/No. Or raise your hand if...

When: When you're looking for consensus or "taking the temperature" of the room.

Why: Sometimes you'll spend forever going around and around an issue only to realize everyone was in agreement from the start, or that no one liked it to begin with.

Five Finger Shoot

What: Have people rank something by holding up 1-5 fingers

When: To rank an idea/evaluate presentation, etc.

Why: Relatively anonymous way to get opinions. Quick!

Confidential Cards

What: People respond to a prompt in writing on an index card and hand it to the facilitator

When: Stakes are high, trust is low, and you need to know what's going on with the group.

Why: If you suspect fear is impeding group process or that many people share common fears/concerns but are unwilling to voice them yet, cards can give the facilitation team information while preserving anonymity of participants. Don't overuse. Work towards trust.

ELICITIVE TOOLS

Storytelling

What: Encourage members of the group to share stories or share one yourself.

When: If some participants lack context or history with the group to make an informed decision, or if there is tension between old guard and newcomers. When old ways of doing things are no longer working. If YOU share, it's to illustrate a concept with evidence.

Why: Honors where the group has been and respects elders while giving new members insight. New member can tell stories, too, and bring new insight to the group from other places. A way for diverse groups to learn where they are coming from.

List Making

What: Getting the ideas out of individual heads and into full group awareness. Can be popcorn/brainstorm, minimize/maximize, ambivalence chart.

Some Types of lists:

Popcorn: People “pop” out ideas – casual brainstorm like.

Brainstorm: There is no discussion, goal is to get under/past the obvious ideas, good when divergent/creative thinking is needed

Minimize/Maximize: lists of behaviors that support and undermine a goal, good for articulating dos and don'ts

Ambivalence Chart: lists of reasons why the group should AND shouldn't do something. makes conflicting commitments more clear.

When: When you don't have time for a go around, etc, and feel that people with opinions will share them freely

Why: Groups are wise because everyone has some information/wisdom. These tools collectivize individual smarts into group smarts. Also we often need to get beyond the obvious answers to find the creative ones. Exhaustive list making can do this.

Bus Stop

What: Place pieces of paper with discussion topics in small groups. Groups discuss the topic and take notes on paper. Rotate the papers at intervals so every group discusses every topic.

When: A group needs new ideas and rapid problem solving energy.

Why: Allows winding discussion, divergent ideas, and churns through a lot of material fast.

Skits

What: Have people prepare and perform short skits demonstrating a dynamic

When: To infuse humor, build group cohesion, or make visible undiscussable patterns.

Why: Skits are funny and memorable and can reveal a lot of dynamics quickly

INTEGRATION/DECISION MAKING TOOLS

Full Group Open Discussion

What: Everyone talking together. Facilitator is focused on summarizing and synthesizing the comments of participants and constantly scanning for opportunities to move the group forward. Other tasks (scribing, timekeeping, stack, etc.) can be delegated to other folks.

When: Its important that everyone be part of the conversation. Decisions are being made.

Conflict is brewing that is relevant to the life of the group. Questions of direction, strategy, or values are on the table. Harm is being addressed. The stakes are high. Or, people are having fun together and doing easy items efficiently and building confidence in the group.

Why: Full group discussion creates a center of meaning for the group. Effective full group work builds confidence and trust. Full group accomplishments build the container. Often the more important decisions will require full group participation. The ground work of reflection and processing you have already done in other formations prepares you for effective full group work.

Tools for supporting full group discussion include: taking stack, go-arounds, round robin go-arounds, talking object, bike rack, and hand signals.

Summarize

What: "So what I'm hearing is (summary of several comments)... does that sound right?"

When: After discussion, to move the group forward, when close to consensus, when the connections among different points are unstated, when you sense an opportunity for action

Why: Facilitators can move work forward expediently by summarizing comments and grouping comments together to underscore key ideas. This is one of the most crucial moves facilitators make.

Synthesize

What: "So throughout this discussion I'm hearing three key areas of concern about how to proceed. They are _____. I'd like to move us into small groups to explore those three core issues in more depth, before we try to make a full group decision. Are people willing to do that?"

When: When you see a pattern in the discussion that is actionable to move the group forward

Why: This is one of the most important moves the facilitator makes, and it often requires the rank and neutrality of the facilitation position to be effective. More of an ongoing flow than a tool, synthesizing what's being said into clear and actionable information is

Call for Consensus

What: In groups that use formal consensus, the facilitator will ask an informed presenter to state the proposal. She will then ask if there are clarifying questions, if there are stand asides to the decision, and if there are any blocks. Finally, she will ask for an audio or visual cue that all participants consent to the decision, and record the decision along with relevant information about timeline and tasks. In informal groups, new formations, or during actions, a facilitator may do a more informal version that is more like a straw poll, and decide to move the group forward if there is enough agreement to proceed with an action plan.

When: When you think the group is in agreement. When a proposal is close to being articulated and people are continuing to debate details. Sometimes you may call for consensus on a simple/agreeable piece of a difficult issue in order to create a sense of accomplishment and clarity before a break. When a decision has to be made.

Why: Calling for consensus formalizes agreements into action plans and provides clarity.

TOOLS TO SUPPORT FULL GROUP DISCUSSION

Go Around/Round Robin

What: Everyone in the room gets to talk. Achtung! This can take years. Good to have a plant go first to emulate a short, concise comment. Peligro! This can make some introvert type people really uncomfortable. Round robin means go round until no one has anything to add.

When: At the start of a meeting/event/icebreaker, during decision making, on a tough issue.

Why: To clarify where people really stand. To flush out differing views on a high stakes issue.

Bike Rack

What: A piece of paper/chalkboard/space to list stuff we don't have time to talk about

When: You don't have enough time or want to keep really focused on one topic

Why: Sometimes awesome ideas come up that would get lost otherwise. Also validates / acknowledges people's contributions even if they aren't on the current topic.

Ground Rules

What: tell people at the start that you have some parameters for discussion and you would like everyone to agree to them. Get their consent to hold them accountable to the agreement.

When: when you have observed and need to intervene on disruptive communication patterns

Why: stating a ground rule at the start can give you something to reference back to when the disruptive behavior happens. (Many facilitators swear by ground rules and never do a meeting without them. Many also develop ground rules with groups, and use them whether there are disruptive patterns present or not. I do not, and I don't think they are useful or effective most of the time. Especially at the start, focusing on rules of how to meet signals to the group that you do not trust them to work cooperatively. Developing ground rules with groups tends to flush out people who feel entitled to making their communication preferences the norm, and usually doesn't empower people who are already marginalized. Instead, notice communication trouble as it happens, and give the group a chance to deal with it. Such as, "I'm noticing that we're hearing from the same voices over and over, and haven't yet heard from any women. What's going on there?")

"Let's hear from..." ...some people who haven't spoken yet...the left side of the room...some people who have never been to one of these meetings... women... young people

What: A way to narrow who is invited to speak

When: You hope to draw out new participants, to make sure one demographic isn't dominating, or to cut off a very dominant speaker

Why: Can be a non-confrontational way to deal with a person/people who talk wayyy too much. Also can make the group more self-conscious about who is speaking and who isn't.

Harvest/Reportback

What: after small group work or pairs, share insights with whole group.

When: After small group work or pairs work

Why: So the whole group learns from small group work. Cautionary tale: the danger with harvests or reports is that they become educationally static- no one learns anything new. The focus of a harvest is to maximize learning/insight. Set time limits and structure carefully.

Hand Signals

What: System of hand signals non-speaking participants can use to signal opinions of what is being said or to signal the facilitator or stack taker if they have a direct response, point of process, or clarifying question. Useful especially during full group discussion.

When: If it is in the group culture or if the group is very large.

Why: It is an efficient way for the facilitator to get information about how to prioritize speakers and when to check the temperature of the group to move forward.

Scribe

What: write things down on big paper so you can work with them later

When: When the group is generating content you need to track

Why: Some people will get more out of reading comments than hearing them. It saves ideas for later. You can't always tell what is useful until later. It's another chance to summarize and synthesize. The notetaker can do this parallel to the facilitator.

DIFFERENTIATION TOOLS

Small Groups

What: Formats vary; there are creative ways to get into them, can be random or intentional
When: To dig deeper into a subject, approach multiple angles of a project at once, blow off steam, liven up a group, give people a chance to talk and interact, problem solve, deal with things that are intertwined. When you are overwhelmed/need a facilitator prep moment!
Why: There is less social pressure in small groups. The container is smaller, so people may take bigger risks. It is easier to churn through a lot of ideas or complex questions quickly. It gives you a break so you can refocus yourself.

Caucuses

What: Small group huddles based on identity
When: When oppressive behavior takes place. Before oppressive behavior takes place. When people need support or clarity from their peers. When mainstream identities are dominating the full group space.
Why: To create privacy and safety when the meeting has become unsafe for people of color or other oppressed folks. Its helpful for people to step into caucuses to process instances of abuse or oppression with folks who share their identity/experience. It is important to get white people and their needs out of the way of people of color during these moments, and for them to focus on their own work.

Pairs

What: Spend a few minutes discussing something with your neighbor or longterm buddy
When: To open a workshop, when things get quiet/boring/sleepy, on a controversial issue when people need to blow off steam, when people are sensitive or upset. Use longterm buddies to create a support system in high stakes meetings.
Why: 30 people can talk for 5 minutes each in 10 minutes instead of 150 minutes ie shorter than a go around. Pairs can build a lot of safety very quickly. Long term buddies can help people stay engaged during conflict.

Open Spaces:

What: Pretty different than everything else discussed. Have stations/tables with questions or discussion topics listed on them. People wander the room and pick topics they want to discuss and dig into those
When: Nice way to open a longer event, or a lunch/dinner. When you want to have people talking in a non-structured yet guided/supported way.
Why: Some groups get grumpy about too much structure. This is a good alternative to focused meetings, and can be used during longer summits to loosen things up.

Breaks

What: Breaks! Food, bathroom, other human needs.
When: Breaks are a tool. They are deceptively powerful. Use them to shake up energy, to give people a chance to caucus informally, to use secondary process. Know when to push a group to decide/solve something hard before a break and when to break in order to move.
Why: Secondary process is always at play. Use it intentionally or be used by it!

ENERGIZING TOOLS

Movement Exercises

What: Stretching, dancing, switching seats, etc.

When: Energy is dropping, morale is low, people seem checked out, at the start of a session

Why: We think with our bodies. Movement is grounding and allows the body to support the mind and emotions.

Role Play

What: Have people play parts in a scenario. Can be a few in front of the group, in small groups, or as a big group.

When: Whenever you're learning something new. Also when dealing with tough issues; to create empathy; practice how to use a new skill. To imagine how a situation will be.

Why: We learn by doing and applying knowledge is crucial to retention.

Ice Breakers/Games

What: There are many! Google it.

When: You need to lighten the mood, you need to transition, you need to shake up stale patterns, people are in a rut and need a creativity infusion

Why: Games are fun. Some groups hate games. It changes the channel and helps morale.

Songs

What: Sing a song. Can have a consistent opening or closing song.

When: You need ritual. You need to cry. You need to remember why you're there.

Why: Music is magical and songs are the heart of the movement.

REFLECTIVE TOOLS

Drawing

What: Have people draw a picture of a situation, the group, how they want their city to look a year from now, etc etc

When: To shake up a talking-heavy meeting, when people need to visualize outcomes or imagine alternatives, when important things aren't being named

Why: Pictures can be interpreted in many ways, and people may draw things they won't say.

Silent Writing

What: have people jot down ideas, write in a journal, record 5 words, etc.

When: you need people to reflect on experiences. You have introverts in the group who struggle to think clearly in high dialogue environments.

Why: this supports introverts who may need alone time to gather their thoughts before dialogue starts. It also helps extroverts filter their ideas before speaking.

Closed Eye Visioning

What: Have people close their eyes and recall a memory or consider a question silently

When: You need people to ground in their own experience, a group is recounting history to new members, you are dealing with sensitive subjects or conflict

Why: People may need to check in with themselves before interacting with others

Check Ins & Check Outs

What: Go rounds of free disclosure at the start and end of meetings

When: Groups need to connect emotionally as well as logistically

Why: A ritual that can be grounding and build the container, check ins also allow people to disclose if they are in a bad mood or struggling so the group can be aware of their needs

Evaluation

What: have people give feedback on the meeting at the end. can use plus minus delta.

When: usually at the end of the meeting. if a summit or series, use regularly to gauge the effectiveness of your facilitation and flush concerns. Noticings, or observations without judgement, can be useful here too.

Why: It places responsibility for successful meetings on the whole group, not the facilitator.

Fish Bowl

What: Have two/more people go in the middle of the room and talk about an issue while everyone watches them without speaking. Can allow witnesses to tap into conversation also.

When: To show two opposing sides – OR to provide insight into lesser known ideas

Why: Mainstreams of groups are often unaware of the realities of their margins. Fishbowls can give margins a chance to show mainstreams how they operate.