Coffee Chat:Facilitation with Rachael Reichenbach, Erica Williams, Noemi Giszpenc, and Joseph McIntyre

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Notes

Factilition is an ongoing theme in our conversations with FSLN members. It comes up as a way of delivering services - developing processes - and is a systems leadership skill for making change with groups. Facilitation has come up for our team in multiple ways.

Question for guests - what is your role as a facilitator? When you step into a meeting you are facilitating, what do you see as your job in that meeting?

- To make easy - to create ease in the process. You must have trust in the group. And we build trust by being vulnerable about the power we hold, by creating a sense of welcome so that people's whole selves are welcome.
- If you're in a meeting there are at least 2 things that are happening - getting work done AND either nurturing or degrading relationships. A good facilitator is tending to both - so that people can participate and be present for the work that needs to happen AND they're feeling camaraderie with each other and feel seen, heard, and connected with each other. You want to run a meeting so that both of those things are happening.
- People who come together for meetings are collectively "throwing a pot" that collectively contains their aspirations and hopes for what they want to create. The facilitator's responsibility is to keep the wheel spinning so that participants can shape the pot. Help people be real with each other - this builds trust.
- As facilitators, we may be "neutral" but we're not passive, quite the contrary -- we're actively making sure that what is happening is truly democratic and inclusive of all the people in the room. This is about power and spreading it in ways that help the parts and the whole. Every meeting is a chance to reinforce democratic principles and skills!

Best practices for Virtual Meetings: How do you get folks engaged and to speak up?

- Can be difficult in a large meeting - so use Zoom's breakout rooms. Lay out an idea, then have a breakout room of 4-5 people. Have a facilitator and a notetaker, so you can have a more interactive session with that smaller group. Come back to the large group to harvest.
- Call on people directly!
- Breakout doesn't guarantee that people will speak up. Sociocracy - tool for governance and decision making. Do most communication or process in rounds - have everyone take a turn. Might feel clunky and rigid, but we know that oppressive systems have to be dismantled. If we don't have process around turn-taking, we find that oppressive systems

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remain. You can elect to pass on your turn, but everyone should have the opportunity to respond.https://sociocracyforall.org

- Dealing with technical issues - make sure folks have the dial-in info. Folks are using different emails so be careful about the calendar invite (Outlook, Gmail, etc.).
- Call out a name to help with the flow. Don't just wait for people to speak up/popcorn.
- Use the chat box for setting the order of turns. Create a list and then use it consistently each time there is an opportunity for response.
- Mindmapping like "miro" and other tools that folks can use/interact with. Creates non-verbal ways of interacting.
- Whoever is responding can "kick it" to someone else to respond next.
- Some ideas to get people to speak up include—going around in order, having a list of names so people can know the order people will speak, having speakers name the next person to speak, using technology that allows participation without speaking. For me it is all about, asking a great question. The question itself opens the space for engagement.

How to prepare for meetings to make sure they go well:
- Make sure everyone has the right call in info- video and phone options for folks with limited bandwidth.
- Share the agenda! Give people an opportunity to weigh in on the agenda. Send it with enough time for people to have a chance to weigh in before the meeting.
- At the beginning of a meeting - for opening the container, create space for grounding and getting present. Recognize we're coming from different activities, help folks arrive. This could be a moment of silent reflection, deep breathing, etc.
- Check in about people's time, remind them of start and end time.
- We have a tendency to put too many things in an agenda. Be mindful and upfront about our use of time and stick to it.
- Two sides to preparation - with and on behalf of the group - you and the group need to be very clear on what it is you're trying to do at the meeting, and- that people are ready to do that work. Second is preparing yourself! Important for facilitators to cultivate a capacity to convey calmness, groundedness. Spend a couple minutes before the meeting to get calm. During the meeting, it is all about them. Oftentimes that means getting yourself out of the way.
- Go rounds - each person will need a minute or two to answer the question. 25 people - most of an hour to have everyone talk. It takes longer for groups to go around than we might think.
- Be sure that you have someone ready to take notes and will take responsibility for sharing those notes. Google Doc. No one is going to remember what anyone said unless it gets written down! And do not facilitate and take notes at the same time.
- Send out pre-work (background, readings, items for input) to help feed the discussion.
- Budget time for after the meeting to synthesize the notes and determine next steps. To do the follow up you've committed to do.

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- Think through the goals of the meeting and run through the scenarios that might happen so you're ready with backup plans.

How much do you script the process? How set is content and timing in advance and how much do you follow the flow of the conversation and adapt to what comes up?

- Notice energetically or in your body what feels like it needs acknowledging, what deserves immediate attention and what might be put off for another conversation. Ask for consent for the group to deviate from the agenda.
- Depends on the group. Sharing time - can go with the flow, more organic conversation. For work meetings that require getting something accomplished, may need to be more diligent in keeping people on task during that time.
- If it's a group that is used to being in meetings and staying on task, you don't necessarily need to think through a ton of time. But if it a group that isn't as productive, you might have more firm guidelines on the time to support the group until they can self-regulate. Use time guidelines as a training tool.
- Value of group agreements - if there's an agreement about sticking to the agenda, you can point back to the agreements to help guide the group back.
  - Group agreements - mutually held agreements on how we want to be and behave in the space.
  - Examples: - be respectful, don't interrupt, etc.
    - Step up, step back - encouraging quieter folks to step up, louder folks to step back. step up your bravery if you tend to be quiet or reserved, step up your listening if you tend to feel comfortable speaking a lot
    - Another option - step up, step up! Step up your voice, step up your listening.
    - Oops, ouch, snaps - Oops if need to retry something/ it didn't come out right, ouch if something hurt or impacted you, snaps if you love or agree with something someone said.
  - Four common ones:
    - **Listen** - for agreement, meaning, disagreement, for opportunity
    - **Respec**t - personal (take care of yourself, mind the space). Respect the absolute truth of another person's experience. No one of us owns the reality that we experience.
    - **Suspend your certainty** - most of think we have the answers. Relax, be uninformed, be naive - can create joy and opportunity.
    - **Voice the things that matter to you** - so we know what we need to know to be able to work together effectively.
  - For agreements from the group or census of how the group is feeling: thumbs up, thumbs sideways, thumbs down. Could be helpful in virtual meetings

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- For shifting the flow of a group meeting/ gathering one of the groups I meet with is using this graph http://emergingleaderlabs.org/files/~16890/28107-original.jpg

When someone in the group is taking more time or taking us off our attention, how to manage tactfully:
- Say their name, to get them to pause for a minute. This is great, but we're getting off topic/ahead of ourselves/etc. Be direct.
- Sometimes these folks don't feel heard. So what can we do to make sure they feel heard - practice active listening, ask if that's correct. Once they have been heard, you can reference that and say "we'd like to offer an opportunity for others to speak"
- Have a bike rack/parking lot to record these tangents - park them there so you can come back to them later.

Ensuring the session leads to action:
- Always end with "what are our next steps" - helps people feel supported and they know where the meeting is going
- Give specific people tasks - put it in the notes, with assigned names. At the next meeting, you can check to see if those things got done
- Allow space for people to say if they need help getting something accomplished.
- DARCI - Decider, Accountable, Responsible, Consulted, Informed
- Send a follow-up email with next steps
- Include updates/ops reports. Key moment for the facilitator to hold folks accountable, and ask for questions, comments, and appreciations - key moment for celebrating accomplishments to positively reinforce getting stuff done!
- MOCHA works: http://www.managementcenter.org/resources/assigning-responsibilities/

Other best practices:
- Facilitator opens up session by sharing what their role is in the meeting.
- I think it's good to leave space for someone who doesn't speak up at meeting, a chance for them to email or follow up on a point brought up.
- https://strategicdoing.net/4-questions-and-10-rules/
- Two tools for recognizing folks:
    - How you capture what they say - flip charts, post-its, written capture.
    - Show by repeating back some portion of what they said - active listening. Use this carefully. Let the speakers words stand on their own. Easy to slip into changing the language, or making it my own / paraphrasing. Be careful about this.
    - For capture - VERBATIM. Or if you need to abbreviate, ask for consent from the speaker if you have captured it correctly.
- For pair share (have folks discuss in pairs and then share a takeaway with the larger grouP) - what is something you heard your partner say? Invitation to practice active listening, demonstrates that they heard what you said.

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- Training for Change has great offerings, here is one specifically for facilitating online meetings - https://www.trainingforchange.org/public_workshops/facilitating-virtual-meetings/
- re: keeping connected to what's happening in the room. There's a nature connection model called ACORN that focuses on North, East, South & West characteristics to create a container. Some of my friends and I have been exploring this model, built off Jon Young's nature connection place based work.http://8shields.org/
- This is a great case where having participants play a specific roles like 'process watcher' or 'keeper of the heart' can bee helpful.
- Great resource for learning about facilitation: https://www.roundskysolutions.com/introduction-to-collab/, particularly the Collab Instructional & Card Set.

How to deal with a facilitator who isn't practicing active listening -
- Be direct and communicate! Listen to hear someone, not just waiting to respond. As a participant, if you have rank or power/privilege in the room - real life opportunity to leverage that power to interject, say something, to pause and create an opportunity for group input. Wait - something is happening here.
- If you notice a meeting isn't being well facilitated - jam the proceedings to say hey, we need to pay attention to this. I trust you as facilitator to handle this, if you're not able/willing to, maybe we need to shift facilitators
- We are all co-hosts of process alongside the facilitator. Language the intervention in a way that minimizes the defensiveness that the facilitator might react with. Center one's own feelings or needs - I am feeling confused, can we take a pause, etc. Facilitator may not notice. Participant can say - here's what i see what is happening.

Takeaways/things people will try/use:
- Put list of names in the chat box so folks know the order for turns
- Four meeting agreements (Listen, respect, suspend your certainty, voice what matters to you)
- Accountability grid (MOCHA)
- Allow myself a few minutes before facilitating - deep breaths and center before start.
- Create agenda, stick to it, have a notetaker, send email follow up
- As a facilitator in community spaces i will be more vulnerable about who i am to try to foster a space full of trust
- Really great idea to have more people facilitate. A great model is to have facilitation rotate through all the members of the group.
- I like the idea of writing down some agreements (like respectful, listen, etc.)

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- In my meetings, I will try to convince my coworkers to create an agenda and stick to it plus I would like us to take notes and send them as email with next steps as accountability

Does anyone have an example of an agreement?

Does anyone recommend having rotating facilitators for groups that meet regularly vs one facilitator for all meetings?
- Definitely a best practice!
- Rotate facilitation so everyone gets practice
- Really great idea to have more people facilitate. A great model is to have facilitation rotate through all the members of the group.

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