

Facilitation Notes

Facilitation Skills

Community
Conversations
Working Group - Oct. 10

Our slide deck for this event: [Slide Deck](#)

Events in our series on facilitation and coalition building:

May 2, 2025: How to Host an Event on Zoom and Build Successful Connections

- <https://reimagineappalachia.org/how-to-host-an-event-on-zoom-and-build-successful-connections/>

July 11th, 2025: Virtual Coalition Building

- <https://reimagineappalachia.org/virtual-coalition-building/>

Sept 5th, 2025: Local Network Building

- <https://reimagineappalachia.org/local-network-building/>

Top Tips:

Here are some of the top tips we've learned at ReImagine Appalachia for keeping audiences engaged and meetings productive:

Practice Make Perfect Easy: Take time learning the tools/options so that you feel prepared. Be patient in knowing it takes time to get a routine down!

Interaction is Key: Try to use breakout rooms, chat and Q&A functionality and encourage introductions!

Follow-up: Your audience will be less distracted during the event if you send materials after, plus they will be likely to attend future events!

Meeting Math: If there are ten people in a one hour meeting that's 600 minutes of time in that meeting. Planning helps make those minutes count.

More on meeting math: If ten people are in a one hour meeting, that is 600 minutes of time you're using. So that means it's worth spending time preparing - even for a weekly staff meeting - to make sure those minutes are well-used. If everyone is getting paid \$20/hour, a ten person, one hour meeting costs \$200

I would argue that time and sanity is a more precious resource than money, but money doesn't grow on trees (neither do time and sanity!).

Consequences of a bad meeting can include:

We all joke about bad meetings - but a poorly facilitated meeting can make participants feel disrespected or unwelcome. They feel their time isn't valued or that they have nothing to add. They stop coming and maybe even tell others not to come.

Here are some of our brainstormed list of what bad meetings can look like:

- Unengaged attendees
- Failure to stick to meeting purpose
- Unequal participation
- Going over on time or needing additional meetings
- Derailment by distractions
- Lack of commitments going forward
- Having ineffective meetings
- Feeling like we're going in circles
- Not being inclusive/participatory—being oppressive
- Losing members
- Losing ideas—from quiet people or people who think you don't care what you think
- Having conflicts between members
- Not have buy in to the process - people will be less committed

Question: What are other ways meetings may inadvertently make people feel unwelcome, uncomfortable or like their time is being wasted?

What's your worst meeting nightmare?



Roles in a meeting:

Even if you don't have a different person in every role, the jobs below still need to be done. Some people are really naturally good at these and some will find them really hard. Whenever we are at a meeting, we should take some small responsibility for all these things no matter what our role.

- **Timekeeper** - follows the set agenda goals and reminds folks of how much time is left
- **Tech Host** - for zoom, etc. Manages the meeting, muting participants as needed, screen sharing permissions, etc.
- **Tech Support** - Helps folks negotiate zoom issues like enabling closed captioning, saving the chat, joining a breakout room, etc.
- **Notetaker** - takes notes - focus on concrete outcomes and next steps
- **Comment Engagement (Chat Hype)**
- **Vibes Watcher** - Monitors how people are feeling to ensure that no one is being ignored or personally attacked. A vibes watcher should also be aware of people that are getting sleepy, restless, or generally too unhappy to make decisions. The vibes watcher can remedy these situations by calling for short breaks, stretching exercises, or bring to the group's attention the injustices s/he has observed.
- **Stack Keeper** Keeps a list of who wants to speak. Makes the facilitator's job easier when there are a lot of people or a complicated discussion. Raising hands makes this easy in virtual meetings!
- **Welcomer or Gate-keeper** - making sure new folks are included and caught up
- **Facilitator** - keeps the meeting running towards its goals - sometimes by doing all of the above.

Tip: If you are trying to get better at facilitating, taking on some of these roles (like time keeper) can be a low pressure way to practice monitoring group dynamics and decision making moments.

Question: What would you add? What roles are easy or hard for you? What could you work at being better at?

Responsibilities of a facilitator:

Facilitate means: To Make Easy--It is a process to make meetings run smoother, be more effective, participatory and democratic, and can be used to guide meetings, discussions, and make decisions.

Some jobs that a facilitator may not do - but makes sure get done include:

- prepare the agenda
- name the goals of the meeting
- guide conversations to stay on track
- ensure all voices are heard
- approach conflicts
- summarize decisions
- ensures clear next steps

Some general factors to consider as a facilitator:

Your agenda is your mission and your entitlement:

Sometimes being a facilitator can feel awkward. Putting the agenda first can help depersonalize the work of a facilitator - make you a more neutral player.

A facilitator takes the lead not because they want to boss people around, but because the group made a goal with their agenda, and you are helping them achieve that goal

The facilitator helps ensure inclusion and the sharing of ideas

Conflict can be good - you don't sharpen a knife with silk cloth, you use a stone. Our ideas and strategies often get better when they are challenged. But having a safe "container" for conflict and a neutral facilitator who is comfortable with conflict is key for that to be productive vs toxic.

- As stated above, bad meetings damage groups.
- A facilitator's job is to sometimes interrupt people or redirect, not because they want to boss people around, but because the group made a goal with their agenda and you are helping them achieve the goal
- When feeling awkward, be transparent about that. You can poll the group if you aren't sure about the right call. "We have budget decisions on the agenda but it seems like y'all want to talk about data centers - should we make 10 minutes for this now or should we find space to talk about it with a more prepared agenda at the next meeting?"
- Being transparent about your goals and motivations helps for buy-in and trust in difficult moments. When your goals and motivations are rooted in shared group commitment as set by the agenda and other agreements, then it's not about you, it's about group process.

A few things to consider when diagnosing meeting difficulties - especially around joint-decision making.

Alignment:

Having a clear agenda in advance of the meeting can reduce conflicts related to alignment and shared goals.

- What are the goals of this meeting? Why does it need to happen with these people?
- Do the participants have different goals for this meeting? If so, what is a common thread?
- How can different approaches be acknowledged?

Pre-work:

- What work can be done in advance of the agenda to make the meeting more productive?
 - For example: responding to prepared proposals might be more efficient than brainstorming the proposals during the meeting
 - Sometimes conversations need to happen in the meeting, sometimes they can begin in a small group and be brought to the larger group for feedback.
- What can attendees do in advance, like brainstorming, to be better prepared?

Invite dissent - Early!

This [Management Center Guide on Decisionmaking](#) offers helpful tips including:

- Get dissent early - dissent helps you know what needs fixed! I often ask people what “feels sticky or more complicated”
 - If you get dissent too late in the game, there may not be much to do about it, so then their opinion didn't actually matter.
 - “Whatever your mode, include questions that invite pushback and concerns. This is especially important if you’re operating in a low-trust environment, if you’re still building relationships with stakeholders, if your stakeholders are on the margins of your team, or if conflict avoidance is a feature of your organizational culture.”

Know what kind of decision-making mode you are in

- Know what mode of decision making you are in ([check this resource from Management Center](#)). Being transparent about how much your audience can influence the process builds trusts and prevents wasted time.
 - **Joint** - we’re in this every step of the way, which means we need to start with messy brainstorming and landscape assessment together.
 - Note: Sometimes brainstorming can feel like a messy waste of time that is ‘going in circles’ being clear about why brainstorming can be messy - because we are truly open to your ideas as we co-shape this project - can help people accept the messy parts
 - Note: Sometimes it doesn’t need to be that messy. Can a small group take on these early stages, and bring a proposal back to the full group for the consulting stage?
 - **Consult** - Your input will really shape our next steps. What ideas do you have? What could make this even better?
 - **Test**- One option we’re considering is A. How does this idea land on you? What parts of that plan do you have concerns about?
 - **Persuade** - Decision-maker(s) want to build buy-in and have already done work to get here; concerns raised will inform improvements (and, in some rare cases, might change the decision)
 - **Tell** - The decision is made. Decision-maker(s) are sharing information, including context or rationale, to promote understanding; questions and input will aid implementation

Use tools to guide your decision making and goal setting:

- There are many pre-made tools that can help you make your goal-setting and strategy setting more efficient in a group setting. One great one is the [SMARTIES tool](#). Working through a tool like this as a group is a great way to move quickly through the decision making process.

Remember that group bonding is a type of progress!

- Folks getting to know each other better, finding joy, and making connections is a genuine outcome and goal you can be working toward. Make it clear when that is your “goal” or some people may view that as “wasting time”

Agenda Construction Tips:

Consider both the content and process:

- Think about **content** – Are these the right topics? Is this the most important thing?
- Think about **Process** – What are the next steps? Who should be included? How can we make a decision? What needs to happen today to make sure our work can move forward productively?

Funnel Organizing:

- Think of your meeting topics like a funnel, start big, and narrow down. **Open, Narrow, Close**
 - Open – with a broad brainstorm, or with history, bird’s eye view, broad perspective
 - Narrow – What fits us best? Where are we? What’s realistic?
 - Close – Who's going to do it? What are our action steps? What’s the decision?

Sort topics by difficulty.

- When possible, start with something easy - this will give the group a sense of accomplishment and energy.
- It’s also fun to end with something short and concrete.
- A structure I like is “hard - fun - hard - fun”
 - For example, budget details or something very technical followed by a discussion of a more uplifting or dynamic program area or a quick update on something that went well

Break it down

- Don’t just put “talk about the budget” for 1 hour. What are the steps and goals? What needs to be decided today to allow productive work to move forward?
 - Write out each step of the conversation, for example:
 - Present the budget overall (widest part of the funnel)
 - Explain a few points that need particular attention or discussion or where you are hoping for particular feedback

- Note any key decisions or next steps that will need accomplished and order those

Overall:

- Check in via one-on-ones before a contentious meeting
- Save announcements for the end – they’ll be shorter!
- Over-estimate time – people love getting out of meetings/taking a break “early”
- Set times for each item
- Brainstorm questions beforehand to ask to get the conversations started
- Have multiple voices/ multiple facilitators
- Consider the different ways that adults learn - People retain information best if they have a chance to “Talk, listen, see and do.” It is important to make sure that workshop methods give participants a chance to practice new skills, talk with each other and see visual aides.

Activities to try:

Many of these work better in person - there are virtual ways to get at these - like mentimeter polls.

Straw Poll –

What: super simple go around to see how people feel about an issue – can use Five Finger Shoot, Thumbs up/Thumbs down or Yes/No.

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

Talk to your neighbor –

What: Spend a few minutes discussing something with your neighbor

When: To open a workshop, when things get quiet/boring/sleepy, on a controversial issue when people need to blow off steam

Why: 30 people can talk for 5 minutes each in 10 minutes instead of 150 minutes ie shorter than a go around.

Small Groups – Why: 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.

Reportback—This is obvious. The risk is this taking way too long and being boring. So, a time limit

established clearly beforehand can be helpful.

Popcorn – **What:** People “pop” out random ideas – casual brainstorming.

How: What do folks think of that? How would you define this term?

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

BikeRack!

What: A piece of paper/chalkboard/space/document/section of the notes or shared workspace 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.

Go Around- (Round Robin)

What: Everyone in the room gets to talk. This can take years. Good to have a plant go first to emulate a short, concise comment. This can make some introvert type people really uncomfortable.

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

Role Play –

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.

Fish Bowl –

Have two/more people go in the middle of the room and talk about an issue while everyone watches them.

When: To show two opposing sides, to provide insight into lesser known ideas, or as part of a presentation or education on a subject

Remember the ground rules! “Ok, this is just brainstorming now, we’ll discuss specific topics later

on” “If you would like to speak, please raise your hand as the group agreed”

5 minute break – This sounds self explanatory, but remember 5 min = 15 min.

Rapid Coordination - an exercise from [Converge](#). A fast-moving exercise to help participants coordinate their existing activities and support each other’s work.

Some more types of ways to do work together:

Visual	Verbal	Experiential
Maps	Fish bowl	role-plays
Tree analogy	Story-telling	scenarios
Posters	People introduce each other	musical chairs exercise
Pictures	(brainstorm)	games/skits
Video	Small group discussion	practice
Power analysis map	Presentation (panel or individual)	planning
Words on newsprint	Large group discussion	actual “doing” and reflecting
Drawing	Pairs discussion	field trip
	Readings	creating poetry, art, music,
etc.		

Things facilitators might say:

Rose reflection:

Thorn- something that wasn’t so good, that you got stuck on

Bud - something that is new and might grow to something you’re interested in

Blossom - something good

Plus/Minus/Delta:

Something good, something bad, something you would change for next time (The uppercase Greek letter Delta (Δ) is the symbol for "change" or "the change in" something, commonly used in mathematics, physics, chemistry, and other scientific fields.)

"Lets 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/when: A question to either draw out new participants, to make sure one demographic isn't dominating, OR to SHUT UP a very dominant speaker

Why: Can be a non-confrontational way to deal with a person/people who talk wayyy too much. Also needed to make sure we're hearing from everyone.

Summarize!

What: "So what I'm hearing is that the group thinks...does that sound right?"

When: After discussion, to move the group forward, when close to consensus

"So what I hear you saying is....Does that sound like what you meant to say?"

When someone is off topic or people won't stop talking:

"I think that is a really important point, but right now we are talking about...can we put that on a list to talk about it at a later time?"

"I'm not sure that fits into the agenda/process we put together, could we discuss that later?"

"Everyone has really important things to say but if we don't wrap this up soon we'll miss lunch"

"The sooner we wrap up, the sooner you'll not be in a meeting" (humorous only!)

Someone asks the facilitator a question that is not for you to answer:

"Well, what do you/does the group think?" (important when people ask facilitator questions by instinct since you're standing at the front- don't fall into authority / decision maker role!)

"Let's consider that question for a minute. What are people's thoughts?"

Wrapping up:

"What's next? How do we move forward with this? What do next steps look like? When does this need done by? **What needs to happen first to move this forward?**"

Too in the weeds:

Sometimes people want to get into the nitty gritty details of a project that is more appropriate for small group work. For example, if you are planning an event, you don't need 40 people to decide which type of cups to buy. You need the full group of forty people to decide on the broad vision and goals for the event, to create guidelines for decision making and values.

So you might say, "Okay, we all know we want to avoid single use plastics for this event, but who can be in charge of finding a few options for sustainable cup purchasing, and maybe emailing those out to the group for a final decision by Friday?"

Aka "I think we're getting too in the weeds here. I think we can agree that we have this shared value for the project, so from there we can assign someone to work out those small details to match up with those values, and then just check in on that progress quickly on the next meeting."

Zoom Related Resources

How is virtual different from in-person?

- Less feedback from the audience.
- More distracted audience
- People may not want to participate in small groups
- Program evaluations/surveys and check-ins are more important.
- Use the chat
 - In person meeting allow for more networking - but an active chat can increase engagement and sidebars are more (usually) appropriate than in an in-person meeting
- Precision matters more
 - Starting on time is more important
 - Ending with clear next steps is also important
 - Clear and repeated instructions for engagement are more important. People can't ask the person next to them what is going on.
 - If there is dead time, people will assume their internet is bad and/or just leave
 - Good tech matters - people are so exhausted by bad tech moments
 - If there isn't a clear goal, people won't come back
- Let people be humans
 - There will be babies and pets. They don't have to be a distraction, but they can bring a sense of shared joy and community.
 - You likely need to call on people or work harder to invite them to participate

How to Host an Event on Zoom and Build Successful Connections

Friday May 2, at 11 am ET via Zoom – We held the first in a four-month series designed to build virtual networking and other technology skills at our community conversations meetings! This event focused on building successful connections via Zoom and how to host an event virtually. At this event, we unveiled our new Zoom user guide, complete with screenshots, attached video tutorials, and step-by-steps!

[Link to event write up here](#)

Items presented during our meeting

- [One-stop-shop for all things Zoom events](#)

- [Virtual event-planning template document](#) - please make a copy to utilize (this is linked in the Zoom events document as well)

Scenarios

Tips for hard, divisive conversations

Listen attentively and acknowledge their feelings respectfully

Take a deep breath first

clarify why it is important to discuss and what the goals are for the future

Set expectations / boundaries before starting the meeting. This allows participants to agree on clear rules. For example, respecting individual's lived experiences.

If you're really having a hard time with a divisive conversation, it could be that people are trying to have two meetings at once and the purpose needs to be clarified; schedule additional meetings

Asking the people on opposite ends of things to talk and bring back a proposal.

The way NOT to resolve conflict is for one person to just take on a bunch of action items (which they might not ever complete)

What is the purpose of the conversation, the outcomes, if that still can happen, by staying on the purpose at the beginning, that can frame the tone. I do mental prep.

"Conserving the LOCAL economy" enjoys wide local consensus.



Any tips/ or phrases/ scripts that you use to interrupt a long talker or stop sidebars?

Thank you! Let's hear from...

These are some great points, but I would like to redirect us to...

say something like "bringing us back to the agenda"

"this seems like it could be a conversation of its own, let's bookmark it" (if that's true)

We will actually talk more about this in future slides.

Thank you blank for sharing. Is there someone who hasn't spoken yet who would like to share their perspective?

"I'd like someone who hasn't talked yet respond to this first"

I love your passion, does anyone else share that?

Distinguish between "Extroverts" & "Introverts" and recommend ways to facilitate each to contribute in disciplined ways.

That is a great point, let's put it in a parking lot topic and come back later



Questions from the audience -

How to engage the people who think all meetings are a waste of time

Engaging people on a virtual platform - especially artists, who often don't love being trapped on zoom without a very good reason :)

Facilitation of hard conversations especially considering the climate we live in today as a overall society with everything being pushed is division.

I would just love to have more tools in the box for engagement, in person or virtual that are meaningful.

dealing with the unkindness of polarization

Avoiding asking for feedback to the group, causing an uncomfortable silence which checks the box of asking for feedback without actually getting any.

How to host a casual event meant to invite people to come, socialize, and just uncover new neighbors for a coalition

Disengaged volunteers - I have a few teams of community grassroots volunteers who make the effort to join monthly meetings, but then don't really talk or add much to those meetings, despite my best efforts to pose questions, choices, and leadership opportunities to them. I'm not sure if it's because I'm the facilitator and also the "expert" but it seems they just want to simply get updates or just go along with anything without in-depth discussions. All of these teams only meet virtually, which may be a coincidence or may contribute to these dynamics.

How to de-escalate arguments.

supporting partners unfamiliar with claiming their agency, autonomy

When you realize the agenda isn't working, and the meeting needs to go in a different direction - how to make that pivot?

pivoting when folks are not interested in the agenda

I hate interrupting people but as a facilitator it is necessary. Any tips/ or phrases/ scripts that you use to interrupt a long talker?

What to do when you lose engagement -

My biggest pet peeve is audience members talking when they should be listening to the speaker or at least not distracting other audience members. How do keep side conversations to a minimum?

What kinds of strategies do you use when there is legacy damage (like prior leaders who did bad things, or didn't listen or take feedback well) which impairs collaboration now?

How to host a kick-off meeting that is engaging (while being virtual) ? How to create a FUN agenda.

How do you actively listen while also planning in your mind what questions to ask next when facilitating a discussion?

The nuanced differences between in-person and online meeting facilitation

How long should you wait after "Does anyone have any questions?" before you move on?

How can I work on making my speaking clear and concise when I am speaking to a group?

We tend to avoid conflict, but a lot of times we need to agree not to work on an idea. How do you hold a discussion to agree that we're not going to pursue an idea at this time?

How to best facilitate community conversations as an elected official

How to keep meetings on agenda when discussion is good, but still taking too long

How do you change culture? And bring people together to build belonging.

<https://designedlearning.com/departing-a-culture-of-control-where-people-are-objects-and-order-reigns-supreme-making-the-ordinary-significant>

Code of Conduct example

Sample NWF Code of Conduct to maybe model as ReImagine:

We all agree NWF and its employees must exhibit the core values of the organization.

- *Collaboration*
- *Empowerment*
- *Inclusivity*
- *Mindfulness*
- *Mission Focus*

All employees commit to further our mission by honoring and exhibiting these core values.

We all agree the core values are not abstract principles, but have real world meaning. For instance:

Collaboration

- *We understand we are stronger by working together with coworkers, affiliates and partners.*
- *We believe that working collaboratively allows us to accomplish goals faster and better and when given the opportunity, we opt for openness and sharing.*
- *We are respectful of our team members.*
- *We engage with all teams of NWF.*
- *We understand that undermining our team members is destructive and does not further the mission of NWF.*
- *We are proactive in reaching out to staff where a difference of opinion lies, with the goal to resolve it or positively manage the difference with respect.*

Empowerment

- *When we are empowered, we find creative ways to resolve our own problems and better contribute to the workplace.*
- *We share what we know and attempt to make those around us better than ourselves.*
- *We choose to be engaged and invested, rather than distant.*
- *We learn to trust in each other's work ethics and capabilities so we can grow stronger and closer as a united Federation.*
- *When you work at a company where no question is too small, you feel encouraged to keep asking. When you work at a company where no task seems too big, you keep trying.*
- *We recognize that sharing information with employees is important so that they can take initiative and make decisions to solve problems and improve skills, and we help employees set a plan for growth, and provide the skills, knowledge, strategies, and tools to be successful.*

- *We accept that different management styles can produce the same outcome.*

Inclusivity

- *We foster a climate that is open and welcoming to diverse people, ideas and perspectives.*
- *We understand the need to be open to differing work styles, opinions, strategies and tactics.*
- *We understand that others will follow your lead on DEIJ efforts, and failure to engage may have negative impact on overall DEIJ efforts.*
- *We recognize that NWF works across the organization, often through integrated teams, and that such team engagement is valued.*

Mindfulness

- *We recognize our words and actions impact others and it is important to lead with kindness.*
- *We understand that how you say something is as important as what you say.*
- *We are aware that tone of communications, written and verbal, matter.*
- *We are aware of the message sent by actions in meetings/attendance and how this could demonstrate a lack of engagement.*
- *We are mindful that disrespectful body language displayed in meetings in response to a difference of opinion can have negative impacts on others.*
- *We recognize that slamming doors, yelling, derogatory and demeaning comments are not acceptable in our workplace.*
- *We avoid making demeaning comments to other staff (particularly younger staff) that undercut their supervisor's authority or that of senior staff.*
- *We actively listen to hear all viewpoints.*
- *We recognize that the pursuit of work life balance matters.*

Mission Focus

- *We keep our mission top of mind!*
- *We ensure alignment between internal and external meetings.*
- *We understand our mission and recognize the contribution that we all make to it.*