

Meeting 3: Core Group Identities

Guide Facilitation Notes

Last updated Nov 29, 2023

Meeting Objective:

In this session, we aim to deepen the conversation around who we are as a Core group, giving individual members the opportunity to share their personal and social identities. This important session will set the stage for focused peer advisory discussions in Meeting 4 and beyond. Additionally, this session provides an opportunity for profound self-reflection on how individual identities may influence and shape unique leadership styles. These initial meetings (M1-M3) are pivotal in fostering a cohesive Core group.

Your Role:

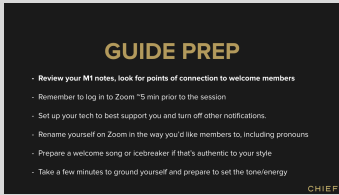
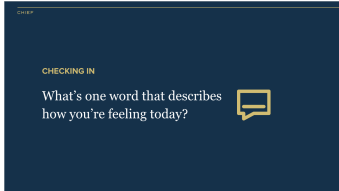
- **Important: Inclusive Facilitation** - While true in every meeting, your role as Guide practicing [inclusive, multipartial facilitation](#) in this M3 session is especially crucial. We ask that you be highly conscious of guiding the group collectively and ensuring that all voices are heard. Given that we will be delving into discussions about each person's identities, it is imperative to approach this topic with intention. We trust your ability to navigate this nuanced terrain and handle the discussion with care, fostering an environment where everyone feels respected and included.
- **Build Connection** - As the Guide, you have the opportunity to help weave the thread of connection between members and between meetings. Highlight connection points and encourage members to continue to explore how this unique group can support and learn from each other.
- **Use Slides** - Please share the prepared slides to walk members through M3. While we want you to add your own flavor to the live facilitating, this expectation-setting is designed to ensure every member has a consistent foundation, so we ask that you make minimal changes.
- **Time Management** - We ask you to bring the right balance of warmth and order to ensure time is distributed equitably for all members to share before the end of the meeting, and to ensure that the session ends on time.

Suggested M3 Outline

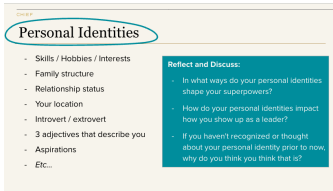
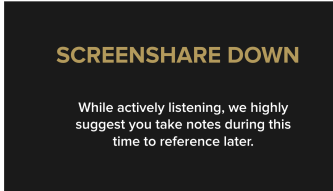
Below is a high level overview of M3 timings and section breakdowns. Remember that this M3 is 90 minutes.

Timing	Slides	Context
8 min	2 - 6	Kicking Off: Welcome, One Word Check In, Core Journey, Initial Framing Plan to cover slides 2-5 in the first 10 minutes to set the tone and context for this session
29 min	7 - 9	Personal Identities (Including Small Group Breakout) Members will reflect on and share how their personal identities influence their super powers and leadership style.
31 min	10 - 12	Social Identities (Including Small Group Breakout) Members will reflect on and share how their social identities influence their super powers and leadership style.
2 min	13	Connect to Peer Advisory As a final wrap to the M1-M3 foundational work, leave space for anything additional that will allow members to feel supported and open in peer advisory.
20 min	14	Wrap Up End by encouraging members sharing a personal reflection or takeaway and discussing Wrap Slides.

Detailed Facilitation Notes

Slide	Facilitation & Voice Over Tips	Timing
01 Prep Slide [Just For You!] 	In the 15 min prior to your session starting, - Log onto Zoom prior to the session. If you run into any technical issues, contact guides@chief.com with 'URGENT' in the subject line. - Set up your tech to best support you. Turn off notifications, especially any audio notifications such as Slack. Prepare your screen(s) to have your speaker notes, slides, gallery view - and a place to take notes if you do so digitally. - Rename yourself on Zoom to include your full name and pronouns.	Final Prep
02 Welcome 	Just as in the prior two meetings, your role is to warmly welcome the group, saying hello to each member by name, and setting the tone. Reminder to review your M1 & M2 notes and look for places you may be able to welcome folks on a more personal level. You may play music if that's authentic to your style as folks are joining. After a couple of minutes of settling into the space when it seems a good number of folks have joined, keep the pace and move forward. Optional: You may opt to keep screen share down completely during the first couple minutes and never show this slide. Inclusive Facilitation Reminders: • Some Chief members have gender identities outside the binary so please refrain from welcoming folks using "women" or "ladies." • If you're not sure if you're pronouncing someone's name correctly, please ask to confirm.	2 min 0:00 - 0:02
03 One Word Intro 	As this M3 will be the meeting we're asking folks to dig the deepest yet, we want to ensure we're fostering a space of openness and empathy. Begin with an opening prompt of verbally sharing a one word check in about how they're showing up today. This will give everyone a chance to share how they're doing today and gives you a sense of what might be on their minds beyond the scope of our session. Validate them with words of acknowledgment, and if folks share a <i>brief</i> description of why they're feeling that word, give space for this to happen. Optional: You may drop this prompt into the chat and bring down screen share, or begin the meeting without it completely, kicking off at Slide 4. If it feels right, close this intro by inviting everyone to close their eyes for 30 seconds, taking a few deep breaths to ground themselves into the space. This mindful pause sets the tone for a more centered and reflective session. This is particularly beneficial if someone seems to be experiencing heightened stress or a more "red" emotional state to ensure we're guiding folks towards a deliberate and thoughtful dialogue, minimizing reactive responses.	3 min 0:02 - 0:05

04 Our Core Journey Core Our Core Journey Meeting 1 Meet Your Group Learn the ropes of Core and set the foundation for strong group connections. Meeting 2 What You Bring Discover your unique experiences, passions, and growth areas. Meeting 3 Your Identities Share and reflect on the personal and social identities part of all of us. Meeting 4+ Peer Advisory The advisory sessions will be focused on your peer advisory.	Talking Points: The first three sessions of Core are all about establishing the groundwork, creating a space for authentic connections and building genuine trust, which will be the bedrock of our peer advisory discussions. In the last couple of sessions, we delved into our experiences, superpowers, and areas of growth, shedding light on how we lead and show up in each of our companies. Today, we're adding another layer to the conversation by exploring your lived experiences within your personal and social identities. Our aim both to set the stage for focused peer advisory discussions in Meeting 4 and beyond, and also to provide you with the opportunity for deeper reflection on how your identities may impact and shape your unique leadership style. These initial meetings play a crucial role in building our understanding of one another as a Core group so we again invite you to bring your authentic self to these discussions and share as much as you feel comfortable.	1 min 0:05 - 0:06
05 5Cs: Focus on Context and Curiosity Core The 5 Cs of Core Commitment Present, show up, and be present. Confidentiality Nothing said in Core leaves the room - ever. Candor Be open, honest, and non-judgmental. Context Share your experiences and actively listen to others. Curiosity Lead with curiosity and engage respectfully across differences.	Remind the group of our shared 5C group agreements, with a focus this time on Context and Curiosity. Talking Points: In this session, as we delve into discussions about our personal and social identities, it's crucial to create an environment of active listening. Let's collectively embrace a mindset of suspending judgment and resist the urge to ask probing questions that others may not be ready to address. You have the agency to determine the depth at which you feel comfortable sharing. Reflect on what aspects of your identity are important for others to understand, especially as we transition into peer advisory sessions. It's essential to recognize that this isn't a forum for comparing experiences; rather, it's an opportunity for each of us to contribute authentically to the collective understanding. Let's approach this dialogue with thoughtfulness and openness, fostering an atmosphere where everyone feels respected, valued, and heard.	2 min 0:06 - 0:08
06 Our Personal and Social Identities Core Personal Identities - Skills / Hobbies / Interests - Family structure - Relationship status - Your location - Introvert / extrovert - 3 adjectives that describe you - Aspirations - Etc... Social Identities - Race - Ethnicity - Class - Gender - Sexuality - Nationality - Religion - Ability - Age	We'll begin with the difference between personal and social identities. When we say personal identities, this refers to a sense of self that a person develops over their life. Your personal identity is a mix of how you see yourself, things we choose to define for ourselves and how others perceive you. This is a non-exhaustive list. When we say social identities, this refers to a person's membership in a social group they are often assigned to us, or something we are born into. Sometimes these identities change over time. Some are visible, many times they are invisible to others. They are all constructs we have created as a society in order to categorize people into groups and something that we have all been socialized into through school, family, media, community groups etc. We often don't experience them in isolation, rather they are intersectional and often affect each other. This list is not exhaustive but does represent the full list of what we'll be sharing about today. We'll spend time talking about what the social identities are in a little bit. We'll begin reflecting with personal first, then social.	2 min 0:08 - 0:10

07 Personal Identities 	As we focus on personal identities, we're going to begin by jotting down the personal identities that are most meaningful and important to us, choosing from the following list to share. As you consider these, think about what is important for others to know about you? What is most relevant that shows up in different areas of your life? What shapes who you are and feels true to your core.	2 min 0:10 - 0:12
08 Personal Identities 	Begin by giving directions and leaving space for reflection [2 min]: We're going to bring back what we shared last time in your superpowers, and consider how those show up in these identities you've just reflected on. The prompting questions to spend some time thinking about are: - In what ways do your personal identities shape the superpowers you possess? - How do your personal identities impact how you show up as a leader? - If you haven't recognized or thought about your personal identity prior to now, why do you think you think that is? Members may focus on different identities for different questions knowing there are intersections and overlap. Reminder that we'll cover social identities next so we'll refrain from including those now. Ask them to write down their reflections here for ~60 seconds, while you prepare breakouts of 3-4 people for them to share. Important: Add the prompting questions in the chat during this time for reference during their breakouts. 15 Minute Small Group Breakouts: Put members in groups of 3-4 for 15 min breakout. If you used breakout rooms in M2, try to pair members with different folks from their M2 breakouts so they can get to know different people. Let them know in this breakout that they will reflect on each of those questions, sharing about ONE identity each time. Encourage them to be highly mindful of time so that everyone has equal speaking time. Each person will have 3-5 minutes to share.	17 min 0:12 - 0:29
09 Group Discussion 	8 min: 0:31 - 0:39 Large Group Breakout Take some time for the whole group to share out. Give everyone the opportunity to first name one reflection they shared that they'd want the whole group to know about them (~30 seconds per person), so they can get to know folks outside of their breakout. Then after that round robin, ask them to reflect on and share what they noticed. Did any themes arise? What connections did they make?	8 min 0:29 - 0:37

10 | Social Identities

Personal Identities	Social Identities
- Skills / Hobbies / Interests - Family structure - Relationship status - Your location - Introvert / extrovert - Adjectives that describe you - Aspirations - Etc...	- Race - Ethnicity - Class - Gender - Sexuality - Nationality - Religion - Ability - Age

Facilitation Note: Prior to this session, it may be helpful to review the [social identity](#) and [socialization](#) materials that were provided as part of the Inclusion in Core Practice Sessions. The cycle of socialization will be a helpful tool as you set up this conversation.

Talking Points: Begin by writing down how you identify in each of these categories, with the knowledge that we invite you to share only as much as you are comfortable. In your small groups we will not be asking you to share specific identities, unless you are comfortable doing so. Rather this process is about reflecting on how these identities impact how we show up as leaders. This is your choice in what you want to bring to this group. Again we recognize that this is not an exhaustive list and for the purposes of this conversation, these are the identities we are asking you to focus on today.

Here you see a list of social identities which provide a framework for understanding how society classifies individuals based on various characteristics. Historically, these identities have been wielded to unfairly privilege some and discriminate against others. The intersection of our social identities, combined with factors like cultural values, subcultural affiliations, and personal tastes, contributes to our unique personal identity—a profile that defines what makes each of us distinctly individual.

Facilitation Note: To ensure a shared understanding, we ask you to take time to give definitions and examples for each. However, if you're running low on time you may instead ask the group if there are any questions folks have about specific identities. We most want to ensure they understand the definitions/differences between race and ethnicity, so please, at minimum, speak to that distinction. Please share your own personal examples of how you identify where you feel comfortable doing so.

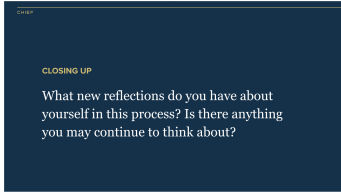
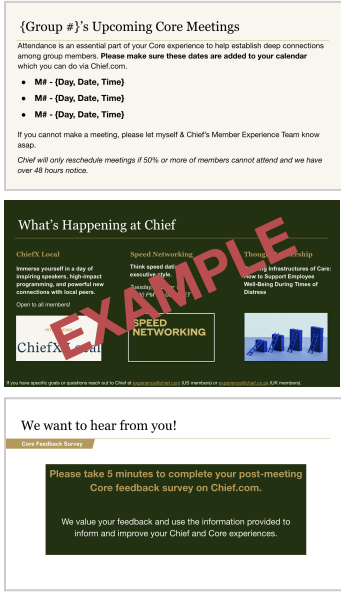
- **Race:** This pertains to group membership based on distinct genetic ancestry, often but not exclusively identifiable by skin color, hair texture, eye shape etc. While we commonly categorize races using terms like White or Black, it's important to recognize the diversity within racial groups and the evolving nature of family structures. *Examples include: White, Black, Asian American, Pacific Islander, Indigenous.*
- **Ethnicity:** Rooted in the cultural origins of one's family, influencing morals, cultural traditions, food, and religion. While linked to race, ethnicity focuses on cultural aspects, with *examples including Korean, Native American, Mexican, Puerto Rican, , Pacific Islander, Maori, Nigerian, African-American, and Kurdish.*
- **Class or Socioeconomic Status:** Primarily related to wealth, education, income, this category also encompasses various social and cultural markers associated with different social classes, such as job types, food preferences, and values. *Traditional classifications include working-class, middle-class, and upper-class.*
- **Gender:** An individual's self conviction of being a man, woman, non-binary, trans, etc. This conviction is not contingent on sex assigned at birth which is based on anatomy, chromosomes and hormones. Gender encompasses categories such as *man, woman, non-binary, transgender, two-spirit (Native American), among others.*
- **Sexual Orientation:** Refers to a pattern of one's attraction or capacity

6 min

0:37 - 0:43

	to engage in intimate, sexual/physical and sometimes emotional relationships with people or genders and the behavior and/or social affiliation that results from this attraction. <i>Examples include heterosexual, lesbian, gay, bi-sexual, queer, and others.</i> • Nationality: The status of being a citizen of a particular country, place or space, acquired by birth, inheritance, or naturalization. • Religion: The belief in a higher power and/or identification with a set of spiritual practices, often associated with organized religious groups such as <i>Catholics, Anglicans, Protestants, Muslims, Jews, Buddhists, and Hindus.</i> • (Dis)Ability: Being differently able (physically, mentally, emotionally) from that which society has structured the “norm” that can result in disadvantages, influenced by social barriers like inadequate infrastructure. <i>Examples include: able-bodied, blind, deaf, depression, anxiety, neurodiverse, physically- disabled, etc.</i> • Age: Years since birth or current life stage. c .In addition to your age, may include your generational identification (<i>Boomer, Gen X, Millennial</i>)	
11 Social Identities  The graphic titled 'Social Identities' features a central blue box with the text 'Reflect and Discuss:' followed by four questions: 'In what ways do your social identities shape your superpowers?', 'How do your social identities impact how you show up as a leader?', 'If you haven't recognized or thought about your social identity prior to now, why do you think you think that is?', and 'If you haven't recognized or thought about your social identity prior to now, why do you think you think that is?'. To the right of this box is a list of social identities: Race, Ethnicity, Class, Gender, Sexuality, Nationality, Religion, Ability, and Age.	Begin by giving directions and leaving space for reflection [2 min]: With the same reflection questions as last time, we're now going to reflect on how our social identities show up professionally. Again, bring back your superpowers, and how you show up as a leader, considering: - In what ways do your social identities shape your superpowers? - How do your social identities impact how you show up as a leader? - If you haven't recognized or thought about your social identity prior to now, why do you think you think that is? Members may focus on different identities for different questions knowing there are intersections and overlap. Ask them to write down their reflections here for ~60 seconds, while you prepare the same breakouts of 3-4 people for them to share, assuming there are still a minimum of 3 per group. Prior to launching into breakouts, please model yourself. For example: <i>"For me when I think about my <insert identity>, I know that has shaped my superpower of <insert superpower> in X, Y, Z different ways."</i> 15 Minute Small Group Breakouts: Group folks in the same breakouts as before. Important: Where last time we shared about one identity with each question, here we invite members to bring any intersectional identities here, knowing they may show up uniquely as well. Again, encourage members to be highly mindful of time so that everyone has equal speaking time. Facilitation Tip: Remind them that these identities have been used to	17 min 0:43 - 1:00

	privilege some and discriminate against others, so sharing how those have shown up for us may be delicate. A reminder to give space for others to share what they are comfortable with and not push past that point with curious questions.	
12 Large Group SCREENSHARE DOWN While actively listening, we highly suggest you take notes during this time to reference later.	Take some time for the whole group to share out. Give everyone the opportunity to first name one reflection they shared that they'd want the whole group to know about them (~30 seconds per person), so they can get to know folks outside of their breakout. Remind the group that as they are sharing, we want them to speak only to their own personal reflections and not share what someone else shared about themselves. Share from an <i>I, me</i> perspective not a <i>we, they, them</i> perspective. Then after that round robin, ask them to reflect on and share what they noticed this time. Did any themes arise? What connections did they make? How does this work we just did with each other, show up as we move into peer advisory?	8 min 1:00 - 1:08
13 Peer Advisory SCREENSHARE DOWN Core groups offer one another incredible depth and breadth of knowledge, perspective, and experience. Through the Peer Advisory structure, the group can tap into this collective wisdom to address challenges and seize opportunities when they need it most.	From here, we want to make a connection to how all of this is supportive and foundational to their peer advisory experience being fruitful, as this will begin in M4 and continue in each meeting beyond that. Talking Points: As we close, we can now support one another with more trust, context, and authenticity by understanding one another's core identities and how that shows up for each of us. These identities will create a lens through which we support and advise one another, providing our own lived experiences that we can offer a perspective through. In this peer advisory space, members can bring their challenges and opportunities, and what's sitting most top of mind for others to help them unpack what's needed to move forward with more support and resources than tackling this solo. Facilitation Tip: As a Guide, you may share how peer advisory has worked with previous groups and why you're excited about this group beginning in the next session.	2 min 1:08 - 1:10
14-15 What's Needed for Successful PA SCREENSHARE DOWN Now that we've elevated these aspects of ourselves, what else do we need so that our peer advisory experience can be successful? SCREENSHARE DOWN Full Group Reflection	Create space for one last group reflection. Let the group know that in addition to the 5 Cs and what they've learned about one another, there may be more that's helpful for them to be successful. How can this group support one another and operate as a personal board of advisors for each other in future meetings? How do we work to be conscious of the different experiences, superpowers and identities that we all bring to this group as we move into peer advisory? This question may take a moment to generate thoughtful responses so please give a few examples of what people may want to name (a non-judgemental space, showing up authentically) and then give the group 30 seconds to think and write, and then ask folks to share.	7 min 1:10 - 1:17

16 Closing Out  What new reflections do you have about yourself in this process? Is there anything you may continue to think about?	In the final minutes, ask for one final reflection. What nuggets of learning do members have about themselves in this reflection process? Is there anything they may continue to think about? Remind them that some of the best insights and a-ha moments may come from hearing others' takeaways so it's a gift to share these out loud because it may spark new ideas by others.	8 min 1:17 - 1:25
XX Wrap Slides  {Group #}'s Upcoming Core Meetings Attendance is an essential part of your Core experience to help establish deep connections among group members. Please make sure these dates are added to your calendar which you can do via Chief.com. • M6 - (Day, Date, Time) • M6 - (Day, Date, Time) • M6 - (Day, Date, Time) If you cannot make a meeting, please let myself & Chief's Member Experience Team know asap. Chief will only reschedule meetings if 50% or more of members cannot attend and we have over 48 hours notice. What's Happening at Chief ChiefX Local: Immerse yourself in a day of inspiring speakers, high-impact programming, and powerful new connections with local peers. Open to all members. Speed Networking: Think speed dating, networking style. Meet 10-15 people in 15 minutes. Meet during Times of Distress. Thought Leadership: Infrastructure of Core: Meet 20 Super Connectors. Meet during Times of Distress. ChiefX Local Core Feedback Survey We want to hear from you! Please take 5 minutes to complete your post-meeting Core feedback survey on Chief.com. We value your feedback and use the information provided to inform and improve your Chief and Core experiences.	End by sharing Wrap Slides and: - Discuss upcoming meeting dates/times (If more than half of the group cannot attend a future meeting, you can discuss a new date/time and email guides@chief.com to request rescheduling). - Highlight “What’s Happening at Chief” including events, programming, community groups, or thought leadership that you think members might be excited about. Consider asking members if they’ve attended an event yet or signed up for one or to share other ways they’ve engaged with Chief outside of Core. Encourage members to go to Chief.com to join community groups or browse through upcoming events. Important: Chief’s member experience research has shown that members who engage in Core and at least one other service/program with Chief have a higher likelihood of realizing the value of their membership so we are hopeful that you can leverage our Guide Wrap Slides to help set them up for success as they embark on their Chief journey! - Lastly, discuss the post-meeting feedback survey. Inform members that they will receive this after every meeting and we encourage them to fill it out each time (it should take no more than 3-5 minutes). Discuss the importance of feedback and how you use it to continually improve the Core meeting experience.	5 mins 1:25 - 1:30

FAQ

What do I do about members that don't show up?

If someone does not attend, log this in the group attendance in your portal. The Chief team will be in touch with that individual to check in, and if they're missing a second meeting we will inquire about their ability to commit to this group and if another time may be a better fit.

What if people come late or leave early?

Member Note in Advance: If a member sends you a note about missing the meeting, or intending to arrive late / leave early, please direct them to letting our team know through [Chief.com/Core](https://chief.com/core).

Arrive Late in the Moment: If a member does show up late, acknowledge them and welcome them to the group but continue at pace. Don't let a late arrival disrupt the flow of the group, but you may want to follow up with them after the meeting to let them know what they missed.

Leaving Early: If someone shares in advance they can't stay the full time, encourage them that they will continue to bond in M3 and beyond and ask them to stay as long as they're able. If something suddenly comes up and someone needs to leave, acknowledge as necessary, but don't let it disrupt the flow of the group and carry on as planned. Please also let the member know that you will be sending them the scheduling survey link after the meeting.

What if someone does not want to be on video?

Our [Core Expectations](#) asks that members should be on video for Core meetings. "*Core participants are asked to join via video (as opposed to dial-in) and have their cameras on during each Core session.*" We want to encourage those not on video to join so it can feel as intimate as possible in a virtual setting. However we know sometimes members may not be comfortable or able to join on video, and we encourage you to manage this on a case-by-case basis as it comes up.

What if I want to add my own flair?

Absolutely, we welcome you to add in your own spice and facilitate in a way that is authentic, so long as you're keeping to the bones of the curriculum and adhering strictly to the learning objectives of each session! You are chosen as a Guide because we value your experience and what you bring to the table. As long as you land all the key elements and objectives, set a foundation for the group's journey, the rest is up to you in how you bring it to life.