

# Facilitating Groups

**People will forget what you said, people will forget what you did, but people will never forget how you made them feel.<sup>1</sup>**

Good retreats and meetings leave people feeling a certain type of good.

Transformed. Awake. Connected. Energized. Fired Up.

Good retreats and meetings help people share important information, discuss critical things, and make wise decisions. Yet, anytime we intentionally bring people together, we should also have grander aspirations. Deep connections. Transformed hearts and minds. Remind people of their beauty, strength and worth. Help unleash passions with confidence.

This guide offers focused reflection and concrete planning steps to help facilitators achieve those aspirations.

Good facilitation means being a partner because everyone is a teacher, a learner and a facilitator. It doesn't matter if you're gifting wisdom from academic knowledge, professional expertise or lived experience; everyone has value to bring and 'ah-ha' moments to find.

P.A.R.T.N.E.R. means:

**Prepare**

**All In**

**Resolve**

**Troubleshoot**

**Notes**

**Experience**

**Return**

## **Prepare: Plan the retreat or meeting.**

Make sure you're clear about why you're coming together.

*Why are you coming together?*

- What do you hope to accomplish?

- What shared knowledge will you build?
- How can you strengthen connections and relationships?
- How might people transform?
- What heights do you hope to reach together that you couldn't find alone?
- What is your role? What are others' roles?

## **All In: Involve and engage everyone attending the retreat or meeting.**

How can you encourage people to bring their strongest commitment, best ideas and truest selves to the effort?

- Create safety through groundrules, deep respect for all voices and perspectives, and a planned way to handle any challenging conversations.
- Invite bravery by modeling it. Be honest and vulnerable if you can and praise others when they're brave.
- Ask good questions that invite people to dig deep and share what they're comfortable sharing.
- Offer space for all voices by encouraging stepping in and stepping back.
- Tap people's creativity through games, artistic expression, movement, and "what if ...?" questions.
- Know when to allow the discussion to continue riffing, when to reflect upon what's said, and when to reign the conversation in because it's gone too far afield.
- Keep it fluid enough to allow for all voices and ideas, yet structured enough to achieve desired results.

### **Sparking Discussion**

Asking open-ended questions can spark imagination and creativity. Try questions like:

- What if...?
- How might we...?
- What are your thoughts about...?

### **Tips for generating discussion:**

- Lightning round: everyone in the group gives a short, concise answer to a prompt question.
- Build upon: one person puts out an idea and one-by-one continue building on that idea.
- Sticker notes: use them to jot down and organize the group's ideas and thoughts.
- No talk sorting: the group organizes ideas together, but without talking. Sticker notes are helpful here!
- Sticky walls and flipchart paper: collect the group's ideas and thoughts in a shared space that everyone can see and have access to. If in person, move around the room. If virtual, use an app that
- Illustrations: have everyone draw their ideas or thoughts and then share with the group.

## **Resolve: Accomplish what you plan to accomplish.**

How will you reach your meeting goals?

- Craft shared understandings of key terms and ideas.
- Find and clarify various options that are different and ambitious, yet also doable.
- Build consensus by engaging all voices and views and ultimately committing to something everyone can support.
- Confirm decisions.
- Commit to actions.

### **Avoid the “Everyone’s Happy” Trap!**

Group indecision happens when:

- The group doesn’t have enough information.
- People are not deeply listening to each other.
- Some individuals in the group are not comfortable to talk.
- The group gets stuck on one option.
- One person dislikes the idea and everyone either tries to appease them or ignores their resistance.
- People don’t realize or they forget that true consensus means everyone can support a decision, even if they don’t necessarily like it or it wasn’t their idea.

True consensus requires an open process so everyone can engage and everyone eventually commits to a decision they can support.

- Gather all available information. If you need more information, pause or reschedule the discussion to have time to find the information.
- Create safety so all voices feel welcome.
- Encourage bravely.
- Explore multiple or many options.
- Respectfully bring concerns and opposition into healthy discussions.
- When the discussion winds down (you’ve explored all the options, shared opinions, debated points of contention, and satisfied questions), state a possible decision and ask each person if that’s the best decision and if they can support it.
- Remember, consensus is about the group collectively discovering the best decision and committing to it, even if individuals must let go of their own opinions.

## **Troubleshoot: Handle things when the retreat or meeting veers into trouble.**

Sometimes, trouble can arise:

- No one's talking.
- Some are silent.
- Some are talking too much.
- Folks are going off on tangents.
- Everyone seems to be ignoring a conflict.
- Folks are fighting in hurtful or unhelpful ways.
- Things feel unproductive (relationship aren't strengthening; decisions aren't getting made; no one's committing to anything; the retreat goals aren't being met...).

### **Be sure to document!**

Document everything and make it visual!

- Write, draw, illustrate as you go.
- Record what you've done!
- Share notes with all the attendees.

### **Own Responsibility for Shared Success**

- No one likes a dysfunctional meeting.
- Anyone, not just the facilitator, can keep people and conversations safe, brave, on point, and connected to the agenda.
- Use open ended questions:
  - I'm sensing not everyone feels comfortable to talk. Anyone else sensing that? How might we make it safer to be brave?
  - I notice a couple of you haven't said much. What might you like to add?
  - I'm sensing some unspoken disagreement. Anyone else sensing that? If so, what's the disagreement about?
- Always feel free to pause or stop a meeting if things aren't working or you're not sure what to do next.

## **Experience: Once the retreat or meeting is over, it's time for everyone to keep commitments and follow next steps.**

- Remind people about group and individual commitments.
- Do what you promised to do and remind others to do the same.
- Set up ways to support and hold each other accountable.
- Keep track of how things are going.

## **Return: Circle back to each other and the work.**

- Re-connect and learn how people have progressed.
- Revisit commitments.
- Review actions and results.
- Adjust any plans as necessary.
- Re-commit to connections, decisions and next steps.
- Keep moving forward, learning as you go.

# Designing a Meeting or Retreat Worksheet

## Defining the Goals and Objectives

**Purpose:** Why are you gathering as a group?

**Objectives:** What value will the experience offer?

1. What do you want to accomplish?
2. What do you intend people will learn?
3. How will people connect?
4. How do you hope people will feel?

## Getting into the Details

| What is the content or topic? | What is the objective for the content or topic? | What will attendees learn? | What exercises or other experiential activities will you use? | What change do you hope to inspire? | What materials will you use or need? |
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## Setting the Agenda

| <b>Timeframe</b><br>(e.g., when and for how long) | <b>Agenda Items</b><br>(e.g., learning objectives, exercises, rapport-building, etc.) | <b>Who is responsible for what?</b><br>(e.g., facilitate, take notes) | <b>Supplies, Materials and Notes</b><br>(e.g., prep work, handouts, markers and paper) |
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