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# WELCOME

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## **CF Leads: Economic Mobility Initiative Cohort Collaboration and Facilitation Workshop**

March 19th, 2025

Co-Facilitators: Amy Casso & Cynthia Silva Parker

## TODAY'S FACILITATORS



**Amy Casso**

Senior Associate

She, her, ella

San Antonio, TX

Latinx/Chicana



**Cynthia Silva Parker**

Senior Associate

She, her


Newton, MA

Black/Cape Verdean

## IISC's COLLABORATION LENS & MISSION



IISC builds ***collaborative capacity*** in individuals, organizations, and networks working for ***social justice*** and ***racial equity***.




***“Sometimes  
your joy is the source of your smile,  
but sometimes  
your smile can be  
the source of your joy.”***

***~Thich Nhat Hanh***

# "This Joy" by the Resistance Revival Chorus

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***“First forget inspiration.  
Habit is more dependable.  
Habit will sustain you  
whether you're inspired  
or not.”***

***~Octavia Butler***

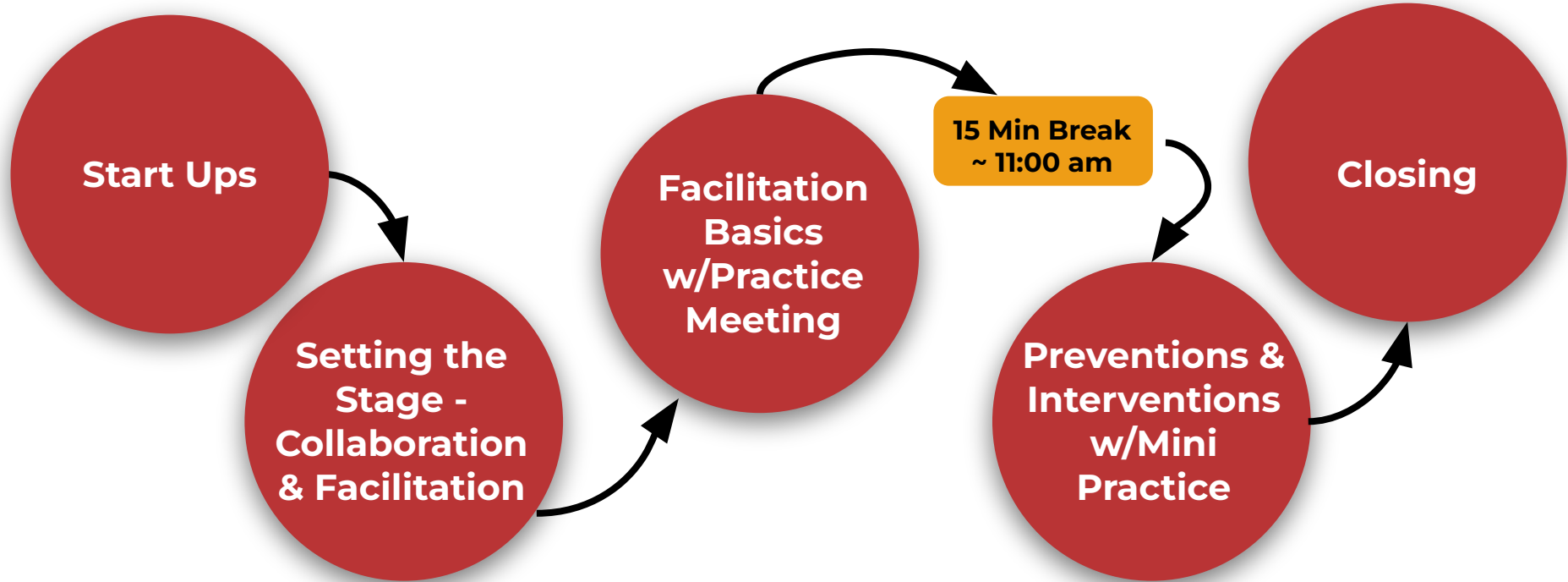
# TODAY'S OUTCOMES

We will explore and practice:

- Ways to build **self-awareness** and the implications of their internal condition (e.g. mind, body, spirit, heart) for effective facilitation
- **Practical skills for facilitating productive conversation**, building shared understanding, and addressing facilitation challenges in support of their economic mobility initiatives
- Navigating conversations to build alignment and **reach an agreement on challenging topics**



# AGENDA FLOW



# COLLABORATION & FACILITATION

# WHAT IS FACILITATION?

- **Facilitation Definition** - facil - to make things easy, the process steward, the process guide
- We see facilitation as creating the necessary conditions that allow people to engage in transforming themselves, their communities, and the systems that impact them.

# WHO ARE FACILITATIVE LEADERS?

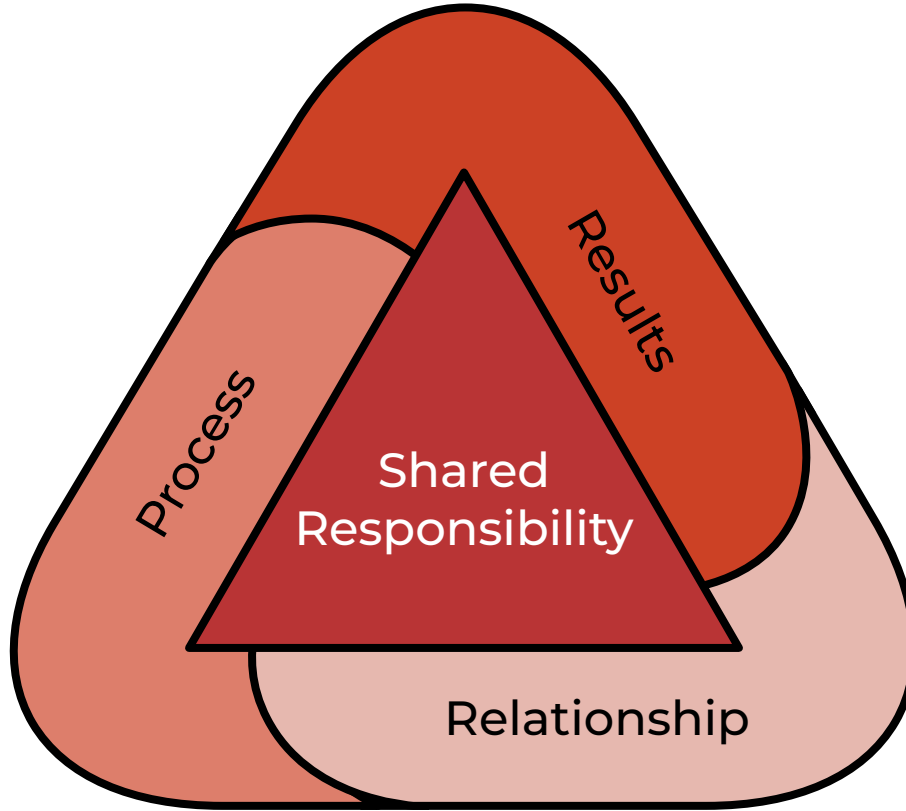
**Facilitative Leaders** create and inspire the conditions for self-empowerment **so that people can work together to achieve a common goal.**



They make it easier for people to:

- Contribute their ideas & expertise
- Speak up when they have problems
- Take initiative
- Work with others
- Make decisions
- Share responsibility for success

# DEFINING SUCCESS



# PREPARE YOURSELF TO SERVE

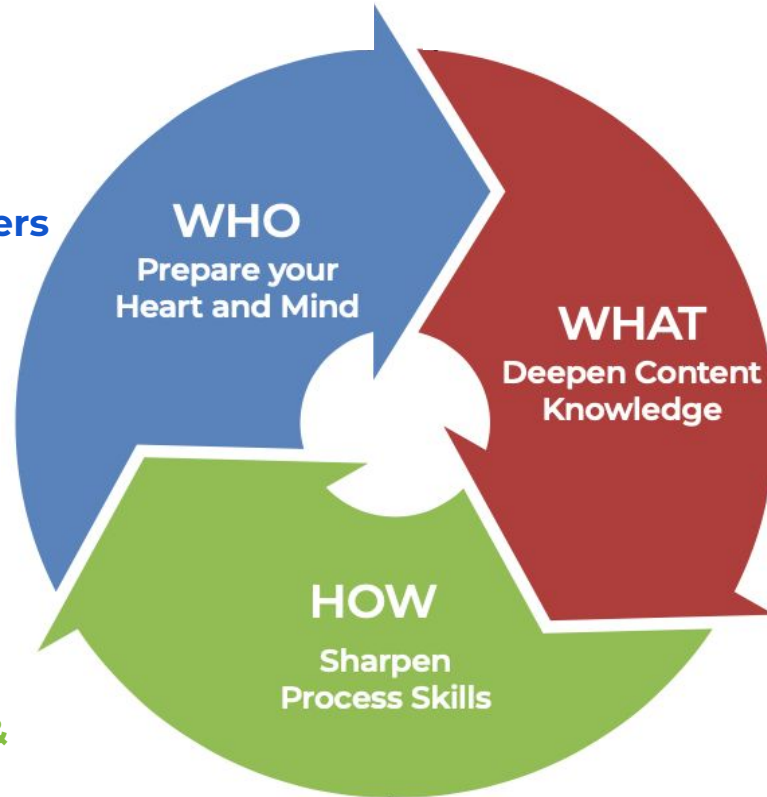
## **Prepare Your “Self”**

**Prepare to Work w/ Others**

**Start with People**

**Prepare Strategically**

**Facilitate Engagement & Agreement**



**Definition & the History**

**Assumptions & Worldviews**

**Power Dynamics & Hot-Button Issues**

# PREPARE YOURSELF TO SERVE

## Prepare Your “Self”

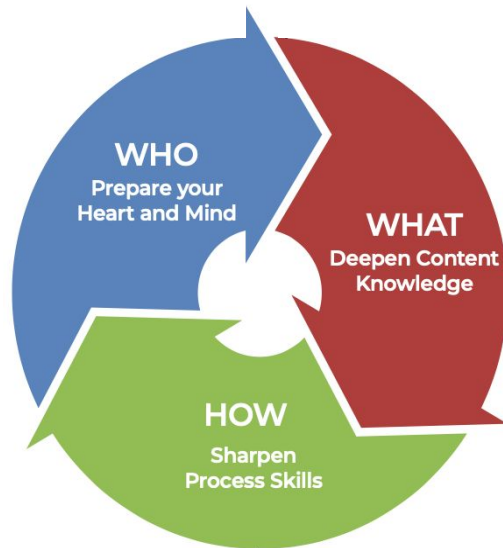
- Ground Yourself
- Make Space for Joy
- Take Care of Your Body
- Deepen Self-Awareness
- Decolonize your Heart & Mind

## Prepare to Work w/ Others

- Be ready to hold strong emotions
- Meet people where they are
- Take a Learners stance
- Know when to take a stand

## Start with People

- Assess Readiness
- Assess capacity for collaboration & conflict
- Design for the whole people



## Prepare Strategically

- Link to overall strategy
- Establish purpose & goals
- Design for engagement & effectiveness
- Prepare materials & space
- Share Responsibility

## Know Your Content

- Be ready to define terms
- Recognize assumptions & worldviews
- Anticipate & engage power dynamics
- Understand History

## Facilitate Engagement & Agt

- Create the container
- Set up for success
- Avoid typical pitfall
- Deal with hot button issues

# SHOWING UP AS A FACILITATIVE LEADER

## **HEAD:**

What should we know?

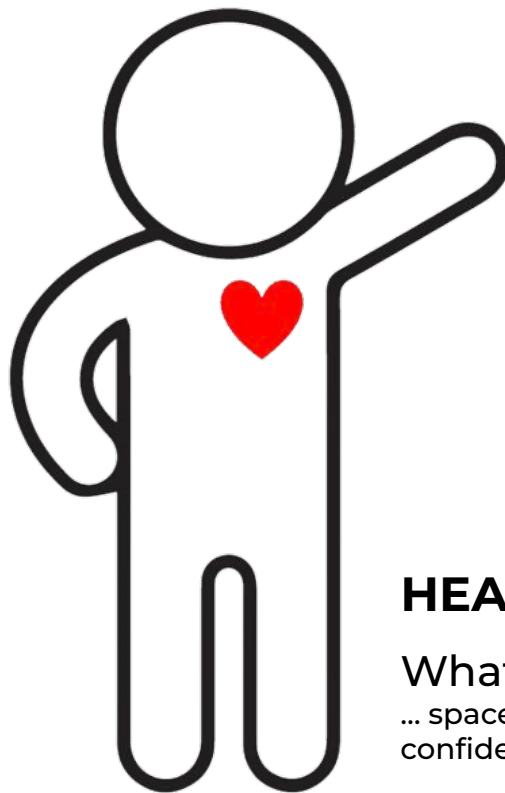
..Balance content knowledge & engagement

... social landscaping

## **FEET:**

What should we be rooted or grounded in?

.. being well-prepared, knowing there's not always time to prep



## **HANDS:**

What should we know how to do (skills)?

.. making space for people to contribute and manage time

... understand the audience and how much they're willing to take on

... facilitative teams with balance of strength of head, hands, feet, & heart

## **HEART:**

What should be in our hearts?

... space to clear mind ... musical cues to build confidence and clarity and energy



# FACILITATION BASICS





# Process/Content Distinction



Interaction Institute  
for Social Change

# MEETING ROLES

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**Facilitation is 1 role (...and sometimes you need a co-facilitator)**

What other roles support successful meetings?

- ★ Leader – person responsible for decision, sometimes leaders are not the right facilitators
- ★ Recorder/Note Taker
- ★ Time Keeper
- ★ Energy/Vibe Checker
- ★ Participants/Team members

Plus, for online meetings

- ★ Chat Manager
- ★ Tech Facilitator (screen sharing, breakout rooms)

# DISTINGUISHING CONTENT & PROCESS

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## CONTENT (WHAT)



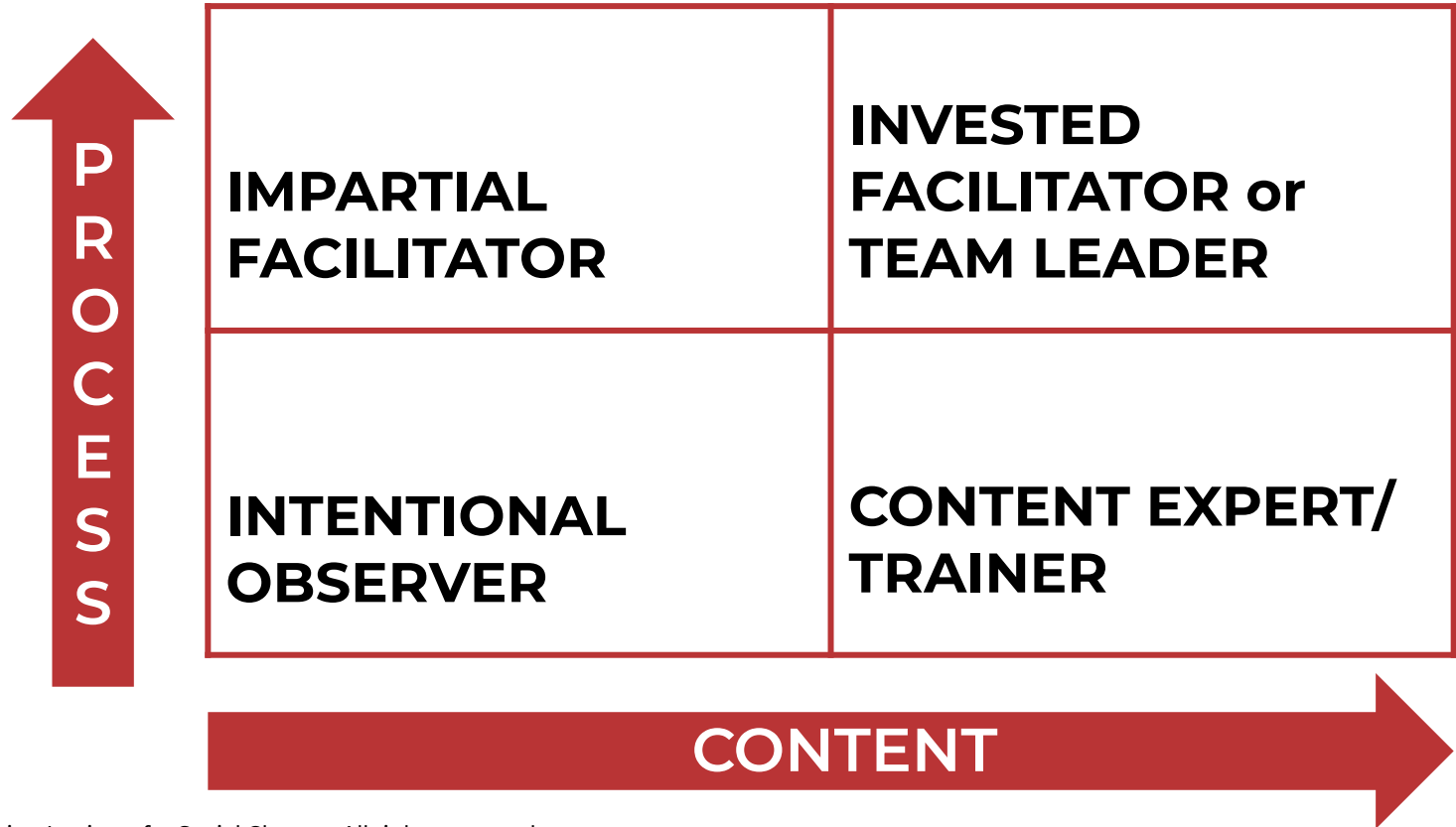
## PROCESS (HOW)



The nature and quality of the product (e.g., the egg) differ depending upon the process.

# CLARIFYING YOUR ROLE AS FACILITATOR

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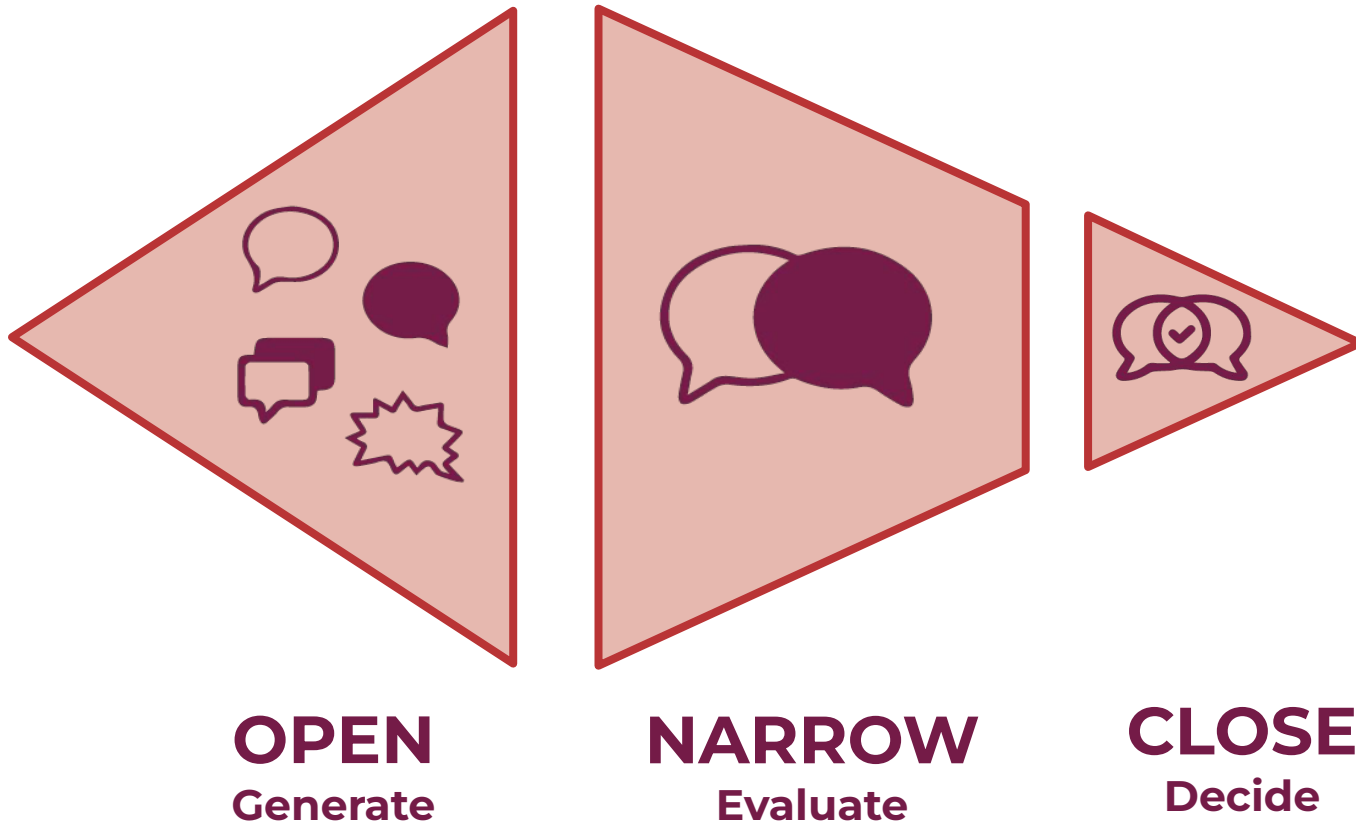


# Stages of a Discussion



Interaction Institute  
for Social Change

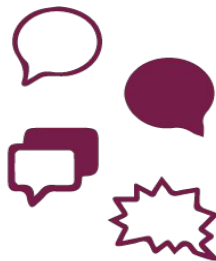
# STAGES OF DISCUSSION



# POLL

Which stage do you think you get more energy from?

Opening/Generating?



**OPEN**

Narrowing/Evaluating?



**NARROW**

Closing/Deciding?



**CLOSE**



# PRACTICE MEETING AGENDA

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WHAT (CONTENT)	HOW (PROCESS)	WHO	TIME
<b>START UPS</b> <ul style="list-style-type: none"><li>- Context</li><li>- Community Agreements</li><li>- Desired Outcomes</li><li>- Agenda &amp; Roles</li></ul>	<ul style="list-style-type: none"><li>- Present</li><li>- Clarify</li><li>- Check for adjustments</li><li>- Check for agreement</li></ul>	IISC Workshop Leader	10 min

# CONTEXT

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This isn't a role play. You are who you are and think what you think.

This is a practice meeting. The topic is real, but you won't have time to complete the desired outcomes as you will need to in your real lives.

We're also using this as an opportunity for you to take another step in using the case-making materials from Dr. T.

For this practice, focus on the first element: *Stake: Connect to People's Aspirations and Build a Strong "We" Around It*, or select another element if you've already worked on this.

# Bringing It All Together

Moving from Separation to Inclusion and Solidarity

Tell People What They Lose if  
They Sit on the Sidelines

Loss Aversion

Name the Power of the  
Moment to Shape the Future

Urgency & Agency

Navigate the Dominant  
Narratives

Mental Models

Anchor & Credential the  
Solutions, Not Problems

Awareness & Agency

Foster Collective  
Ownership

Power Shifting

Tell the Story of US

Leveraging the Power  
of Storytelling

Make Inequitable  
Systems the Villain

Systems Orientation

Clarify Your Value  
Proposition

Trust

Share Your  
Roadmap and  
Metrics for  
Success

Trust & Clarity of  
Purpose

Connect to  
People's  
Aspirations &  
Build a Strong  
"We" Around It

Stake



# DESIRED OUTCOMES

By the end of this practice meeting, you will have developed:

- ➔ Initial agreement on 4-6 key shared aspirations for our economic mobility project
- ➔ Agreement on a few immediate next steps

# PRACTICE MEETING AGENDA

WHAT (CONTENT)	HOW (PROCESS)	WHO	TIME
START UPS		IISC	10 min
<b>MAKING THE CASE FOR OUR ECONOMIC MOBILITY PROJECT</b> <i>STAKE: Identifying Shared People's Aspirations</i>	OPEN	Facilitator 1 Recorder 1 Timekeeper 1	10 min
	NARROW	Facilitator 2 Recorder 2 Timekeeper 2	10 min
	CLOSE	Facilitator 3 Recorder 3 Timekeeper 3	15 min
<b>CLOSERS</b> <ul style="list-style-type: none"><li>- Next Steps</li><li>- Check Out</li></ul>	<ul style="list-style-type: none"><li>- Brainstorm</li><li>- Round Robin</li></ul>		

# TOOLS TO OPEN

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**OPEN**  
**Generate**

# PRACTICE MEETING - OPEN

WHAT (CONTENT)	HOW (PROCESS)	WHO	TIME
<b>MAKING THE CASE FOR OUR ECONOMIC MOBILITY PROJECT</b> <i>STAKE: Identifying Shared People's Aspirations</i>	OPEN  → Individual reflection time  → Round robin (multiple rounds if necessary; people can pass if they are out of ideas)  → Check for Understanding	Facilitator 1  Recorder 1  Timekeeper 1	10 minutes

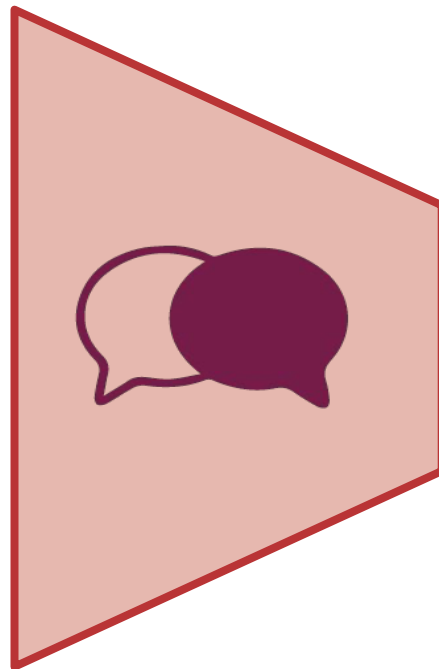
# OPENING TOOLS (Generative)

- 🌻 Individual Reflection
- 🌻 Round Robin
- 🌻 Check for Understanding /Clarify
- 🌻 Ask for or Make a Proposal
- 🌻 Generate a List
- 🌻 Think-Pair-Share
- 🌻 Dialogue Circles
- 🌻 Brainstorming ... *and many more*





# TOOLS TO NARROW



**NARROW**  
**Evaluate**

# PRACTICE MEETING - NARROW

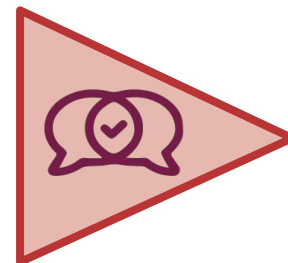
WHAT (CONTENT)	HOW (PROCESS)	WHO	TIME
<b>MAKING THE CASE FOR OUR ECONOMIC MOBILITY PROJECT</b> <i>STAKE: Identifying Shared People's Aspirations</i>	<b>NARROW</b> <ul style="list-style-type: none"><li>→ Eliminate Duplicates</li><li>→ Prioritize (N/3)</li><li>→ What Stands Out</li><li>→ Advocate</li></ul>	Facilitator 2  Recorder 2  Timekeeper 2	10 minutes

# NARROWING TOOLS (Evaluative)



- ✿ Eliminate Duplicates
  - ✿ Prioritize (N/3)
  - ✿ What Stands Out?
  - ✿ Advocate
- 
- ✿ Criteria Checklist
  - ✿ Pros/Cons
  - ✿ Best/Worst/Most Likely Case  
.... *and many more*

# TOOLS TO CLOSE



**CLOSE**  
**Decide**

# PRACTICE MEETING - CLOSE

WHAT (CONTENT)	HOW (PROCESS)	WHO	TIME
<p><b>MAKING THE CASE FOR OUR ECONOMIC MOBILITY PROJECT</b></p> <p><i><b>STAKE: Identifying Shared People's Aspirations</b></i></p> <p><b>Desired Outcome:</b></p> <ul style="list-style-type: none"><li>→ Initial agreement on 4-6 key shared aspirations for our economic mobility project</li></ul>	<p>CLOSE</p> <ul style="list-style-type: none"><li>→ Revisit &amp; Confirm Desired Outcomes</li><li>→ Ask for Proposals</li><li>→ As Needed:<ul style="list-style-type: none"><li>◆ Negative Poll</li><li>◆ Build Up/ Eliminate</li><li>◆ Both/And</li><li>◆ Focus on Agreement</li></ul></li><li>→ Zoom Out: What's Missing?</li><li>→ Check for Agreement or Implement Fallback Decision Making Options</li></ul>	<p>Facilitator 3</p> <p>Recorder 3</p> <p>Timekeeper 3</p>	<p>15 minutes</p>

# CLOSING TOOLS (Decisive)

- ✿ Revisit and Confirm Desired Outcomes
- ✿ Ask for Proposals
- ✿ As needed:
  - Negative Poll
  - Build Up/Eliminate
  - Both/And
  - Focus on Agreement
- ✿ Zoom Out: What's Missing?
- ✿ Check for Agreement or Implement the Fallback Decision-Making Option



# QUESTIONS FOR CONSIDERATION WHEN USING FRAMEWORKS/TOOLS

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- Is moving toward agreement what the group needs? Who does the agreement serve?
- Do(es) the tool(s) we are using privilege certain people/groups in the process?
- What tools can I use to increase participation, access, and a chance for equitable outcomes?
- How can we use the tools/frameworks to normalize discussions around power? How can we use them to disrupt existing power dynamics?

# Container Building (aka Preventions) & Interventions





## STRATEGIC CONTAINER BUILDING

are used before or during a discussion to prevent the discussion from getting off track.



## INTERVENTIONS

are used during a discussion to help people get back on track from moments when they are confused, spinning their wheels, or participating in counterproductive debate.

# KEY PRINCIPLES FOR INTERVENING

- Attune to yourself and the group
- Honor and protect each person's humanity
- Start with the lowest level of intervention
- Interventions are a service to the group
- Seek to address underlying concerns so that people can manage their own behavior
- Be mindful of power & identity. Interventions require & shift power

# CONTAINER BUILDING

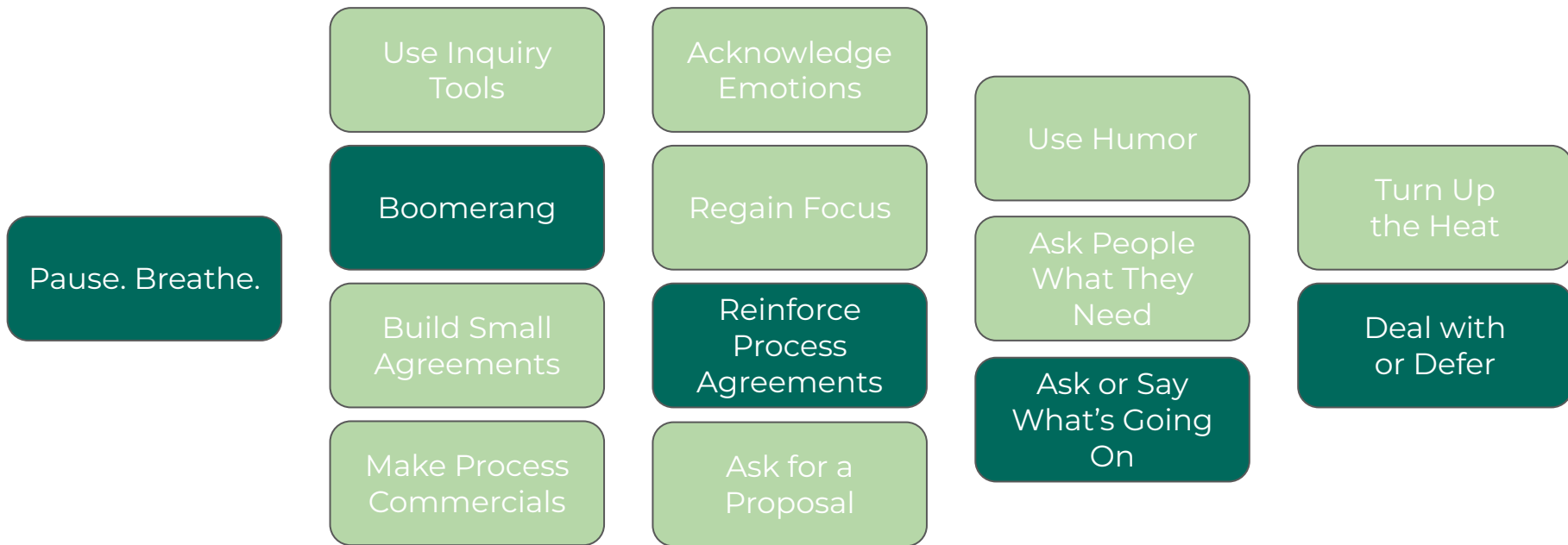
## Before the meeting

- Prepare yourself to serve
- Be ready to define terms
- Prepare for hot button issues
- Involve participants in designing the meeting (desired outcomes, agenda, roles, etc.)

## During the meeting

- Get group agreement up front on what we're going to do and how (e.g., desired outcomes, agenda, working agreements)
- Clarify the process
- Focus on agreement not disagreement

# PROCESS INTERVENTIONS

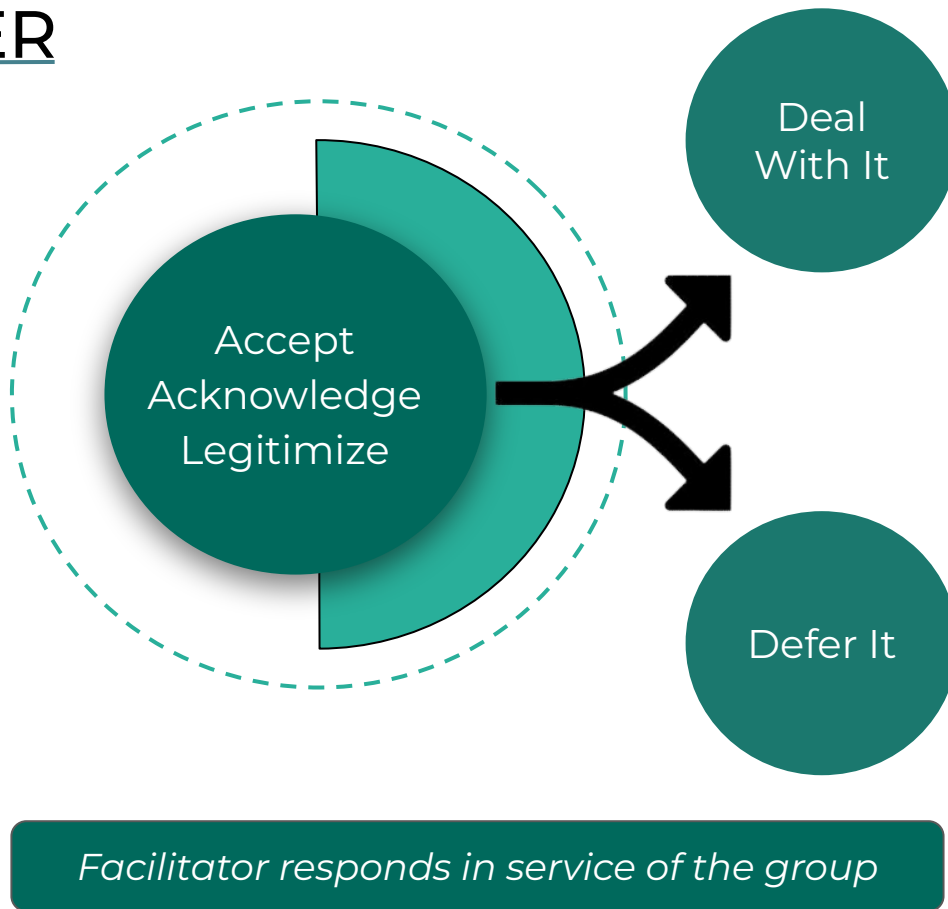


INCREASING SKILL & TRUST REQUIRED\*

# DEAL WITH OR DEFER



*Participant raises  
concern or challenge*



*Facilitator responds in service of the group*

# REFLECTING ON FACILITATOR POWER

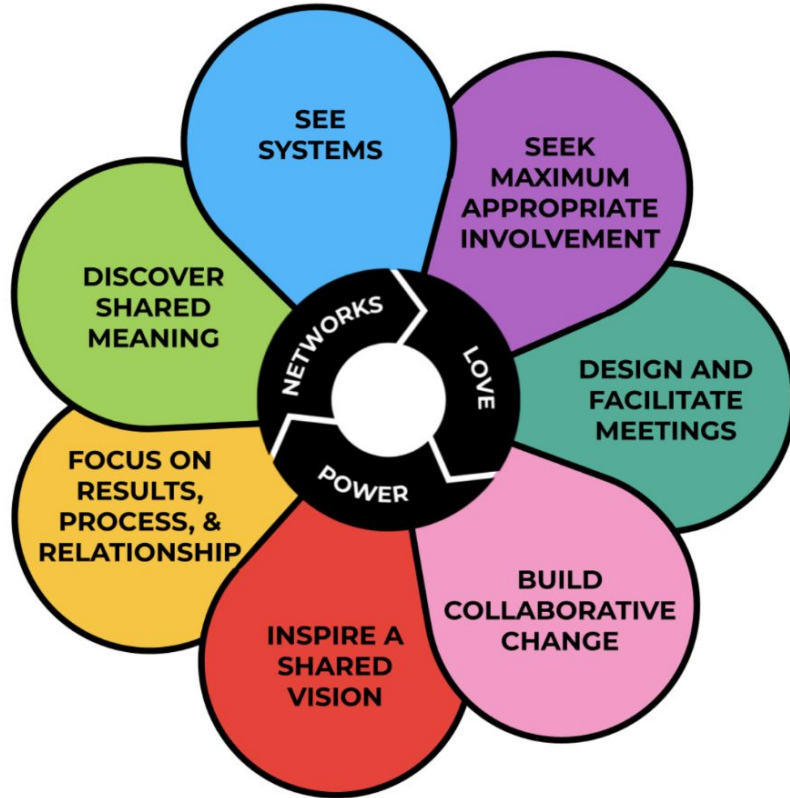
- Whose comfort, desires, and expectations do I attend to most?
- How do I respond to being challenged?
- How does my social location inform my decisions and how others understand my actions?
- Who chooses the meeting agenda and outcomes?
- Who develops proposals for the group to discuss?
- When and how are less-central stakeholders involved?
- Who can I lean on for support and feedback

Given all of this and the tools we explored today, what are a few next steps I can take to keep developing my facilitation skills?

*Excerpts from ...*


## **FACILITATIVE LEADERSHIP™ FOR SOCIAL CHANGE**

PARTICIPANT RESOURCE PACKET



### **PACKET INCLUDES:**

- Facilitative Leadership™ for Social Change Overview
- Facilitate Meetings
- Design Meetings (w/Agenda Template)
- Seek Maximum Appropriate Involvement of Stakeholders in Decision Making



What's one **takeaway**  
or one **next step**  
I'm planning to take  
based on  
this morning's session?



# A FEW ADDITIONAL RESOURCES

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## ***Resources mentioned during the workshop:***

[The Hybrid Meeting Guide](#), Priya Parker

[Fist-to-Five Consensus Building Tool](#), Richmond Co-Housing

[Liberating Structures](#), Liberating Structures

## ***Pework readings, plus a few other useful resources:***

- [Preparing Yourself to Serve](#) - Read the introduction (pages 1-3). Then feel free to explore the details of any section that speaks to you.
- Additional Resources to Explore
  - [How to Show Up When Your Work Is Under Attack \(SSIR\)](#)
  - [Investing in Racial Equity through Charitable Grants and Services](#)
  - [Legal Q&A](#)
- [Countering Attacks on Racial Equity](#), RacialEquityTools.org
- A growing list of [resources to meet the current moment](#) curated by IISC.

# Thank you!

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Amy Casso & Cynthia Silva Parker

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