ANTI-OPPRESSIVE FACILITATION FOR DEMOCRATIC PROCESS
MAKING MEETINGS AWESOME FOR EVERYONE
BY AORTA, UPDATED JUNE 2017

Inefficient and ineffective meetings can leave people feeling drained, exhausted or discouraged, rather than inspired and energized. Good meetings help build strong, effective organizations and successful projects. Even organizations with great meeting process inadvertently perpetuate barriers to full participation and access to democratic process. This happens through group dynamics of power, privilege and oppression that often marginalize women, people of color, queer, trans and gender non-conforming folks, people with disabilities and those with limited access to the cultural cues and financial resources that come with class privilege.

Whether or not you act as facilitator at meetings you attend, building your facilitation skills will help you make your meetings better, more inclusive, and more fully democratic! Here are some foundational tips and suggestions that can have big impacts on your meetings.

WHAT IS FACILITATION, ANYWAY?

Facilitation ensures that the group is empowered *as a whole.* Effective facilitation:
- Ensures that everyone gets to participate and share ideas in a meeting, not just those who feel most comfortable speaking up and making cases for their ideas or proposals.
- Helps prevent or interrupt any (conscious or unconscious) attempts by individuals or groups to overpower the group as a whole.
- Mitigates and interrupts social power dynamics. Points out and addresses discrepancies in who is talking/whose voices are being heard.
- Helps the group come to the decisions that are best for the organization/whole group. Helps people keep an eye on what's best for the group, rather than their personal preference.
- Ensures the group follows it's own agreed-upon process and meeting agreements.

The facilitator keeps an eye on time, and juggles it with the (ever present) need for more time.
- Offers periodic time checks where needed.
- Helps keep the group conversation on topic and relevant. Prevents ramblings and tangents.
- Makes process suggestions to help the group along.
- Summarizes discussion, synthesizes people's comments when helpful, and notes key areas of agreement, to help move the group forward.

Some things facilitators *don't* do:

- Dominate the speaking space.
- Comment on people's ideas.
- Let individuals take the group off-topic and off-task.

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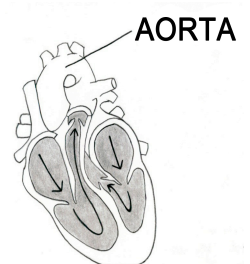
CONTAINERS FOR YOUR MEETINGS

Things like community agreements, an agenda, an available chart of your group's decision making process, and a place to store important topics for future conversations, next steps, etc. are important foundations for a meeting—we call them "containers." They act as visual tools that participants and facilitators can come back to throughout the meeting to help keep the group focused, on track, and on the same page. They also offer direction for moments when things get sticky or tense.

Community Agreements

Community agreements help define your role as facilitator and clarify the group's expectations of you. One of your big responsibilities to the group is to make sure these agreements are upheld. This isn't about creating rules—it's about creating and clarifying agreements and expectations that allow everyone in the group to participate. In order for these to be meaningful, they need to come from the group itself. Once a group creates its agreements, they can be used over and over. As a facilitator, you get to contribute to this list, too.

Below are some community agreements that can be helpful in meetings. Not all of these will be useful for every group, depending on the culture and preferences of the group and the individuals within it. (Some of these were developed/adapted by AORTA, others have been crowdsourced over time from our broader galaxy of facilitation colleagues.)

ONE DIVA, ONE MIC
Please, one person speak at a time. (It can also be useful to ask people to leave a few moments in between speakers, for those who need more time to process words, or are less comfortable interjecting in a conversation.)

NO ONE KNOWS EVERYTHING; TOGETHER WE KNOW A LOT
In any conversation, especially ones about systemic power (race, class, gender, etc), we know that each person is coming to the conversation with different levels of lived experience and embodied expertise. We also believe that each person has something to contribute to the conversation. This agreement asks that we all practice being humble, and look for what we have to learn from each person in the room. It asks us to share what we know, as well as our questions, so that others may learn from us.

MOVE UP, MOVE UP
If you're someone who tends to not speak a lot, please move up into a role of speaking more. If you tend to speak a lot, please move up into a role of listening more. This is a twist on the on the more commonly heard "step up, step back." The "up/up" confirms that in both experiences, growth is happening. (You don't go "back" by learning to be a better listener. In fact, listening is a frequently feminized skill that is often seen as a lack of something. On the contrary, choosing to learn how to listen moves both you and the group up.) Saying "move" instead of "step" recognizes that not everyone can take steps, while we can all move in body or spirit.

WE CAN'T BE ARTICULATE ALL THE TIME
As much as we may wish we could! Often people feel hesitant to participate in a workshop or meeting for fear of "messing up" or stumbling over their words. We want everyone to feel comfortable participating, even if you don't feel you have the perfect words to express your thoughts.
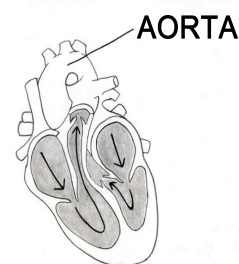
BE AWARE OF TIME
This is helpful for your facilitator, and helps to respect everyone's time and commitment. Please come back on time from breaks, and refrain from speaking in long monologues.

EMBRACE CURIOUSITY
We make better decisions when we approach our problems and challenges with questions ("What if we…?") and curiosity. Allow space for play, curiosity, and creative thinking.

ACKNOWLEDGE THE DIFFERENCE BETWEEN INTENT AND IMPACT
We have noticed that most often in the spaces we facilitate, when someone does or says something that causes harm or supports the values of oppressive systems, it is not their intention to do so. But when we use our good intentions to deny (or avoid being accountable for) the harm, more harm is caused. The ask in this community agreement is that we each do the work to acknowledge that our intent and the impact of our actions are two different things, and to take responsibility for any negative impact we have. (This can be as simple as apologizing.)

NOTE: There are a few community agreements that participants often bring up that we don't tend to use or bring with us. Two of the most common ones are "assume best intentions" and "default to trust." The reason we don't use these is because when someone is unable to do this (say they're feeling untrusting of someone, or unsafe), having a community agreement telling them to do so isn't going to change anything. These agreements aren't always realistic, especially when we take into consideration that when people have been harmed by sexism, racism, homophobia, transphobia, classism, they/we build up necessary tools to care for and protect themselves/ourselves. Agreements we offer instead that capture the spirit of these are "we can't be articulate all the time," "be generous with each other," or "this is a space for learning."

The Magic of an Agenda
There are many different ways to build an agenda to match the style, culture, and needs of each group or meeting. However you do it, a clear and well-constructed agenda that all participants can agree to is a crucial step for an efficient, inclusive, and awesome meeting. The facilitator's job (generally) is to keep the participants on track by following the agenda as well as paying attention to when the agenda isn't working and changes need to happen. Here are some best practices regarding agendas:

- Set the agenda before the meeting starts. You can build it over email, through a list that is kept in an office, or at the end of the previous meeting. This helps everyone come well researched and mentally and emotionally prepared. If that's not possible, create the agenda at the beginning of the meeting.
- Some groups like a more emergent and organic style for building an agenda. If this is your group, participants can spend the beginning of a meeting writing each agenda item they'd like to discuss on an index card, and then the group can use different visual tools to select the card(s) people are most moved to talk about. The down side: you don't know what you're talking about in advance, so you can't prepare or share your thoughts if you're not able to attend.
- Review the agenda at the beginning of the meeting. Share your reasoning before asking for amendments or changes. It is important that the whole group be on board with the agenda.
- Announcements and report-backs at the beginning of the meeting can save a lot of time.
- Give it variety: mix up the length and type of agenda items.
- Put agenda items that will be easy successes early in the meeting. This sets a positive tone and builds momentum!

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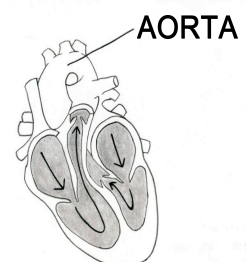
- Follow with the "big stuff."
- Break after big discussions.
- Schedule breaks for any meeting more than 90 minutes. After this length of time, groups fall into the trap of "decision fatigue," making big decisions rashly or getting stuck talking in circles on smaller decisions.
- Finish on something short and easy—end with a good tone.
- Display the agenda so that all can see it (either on flip chart, blackboard, projector, or printed out).
- Label items with their expected actions: decision, discussion, play, evaluate, brainstorm, review, update, silence, feedback, appreciations and concerns. The expected action or desired outcome will/should inform how you design your facilitation approach for that item.

Garden/Bike Rack/Topics for Future Meetings
Whatever your group chooses to call it, have a sheet or ongoing list to write down ideas, questions, and topics for future meetings that arise. Often in the course of talking about one topic, really important things surface that need to be addressed, but are not on the current meeting's agenda. Unless they are urgent/time sensitive, it can really help keep the group on topic to have a space to note them so that they can be incorporated into future meetings (and not forgotten about!).

Next Steps/Who, What, When, Priority
It can be very helpful to keep a sheet where you're taking running notes on any next steps or tasks that are coming out of the meeting. We sometimes do this in three (or four) columns: one for **who** is doing the next step or task (this could be an individual or a group), **what** it is they're going to do, by **when** they will have done it, and what **priority level** the task is (1-3, 1-5). You can end the meeting by reviewing this sheet and filling in missing details. You can also start your meetings by checking in with the sheet from the previous meeting.
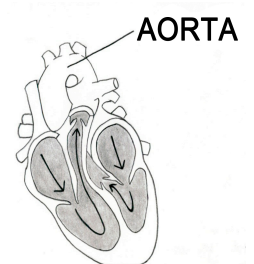
COMMUNICATION AND CULTURE

STRIVE FOR EFFECTIVE. THERE IS NO "BAD" AND "GOOD."
- What is considered "good" communication changes from culture to culture. Approaching people with the belief that there are "good" and "bad" communicators can escalate tension and conflicts.
- Our job as facilitators is to build up our toolkits to be <u>effective</u> communicators. This requires us to look and listen to how our communication style is working for the other person, and to change things to <u>move towards</u> the other person. It means we move away from rules about communication, and towards effectiveness.
- The more diverse a group is, the more this comes up for the group. Everyone is bringing with them their cultural standards and expectations, and these are not always the same.
- Beware! You will bring your own cultural expectations and rules with you as you facilitate. Bring awareness to this as you facilitate, especially when you are working with groups or individuals that are challenging for you.

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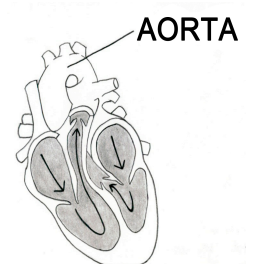
SYNTHESIZING

Synthesis tries to get to the core of what someone is saying. You look for <u>emotions</u> and <u>values</u>.

This is one of the tools we use the most. It is helpful in many contexts, including:
- when groups are in active conflict.
- when an individual is emotional or repeating themselves.
- when the group is multiracial, multicultural, multi-class, etc.
- when people's first languages differ.

What can synthesis do?
- It can be deescalating. People usually feel reassured that they are being heard, and listened to.
- It is clarifying, and can prevent miscommunications because you focus on listening for understanding.
- It can help slow down a conversation.
- It can help others build empathy and compassion.
- It can help calm down emotions.
- It can help us ask better questions to clarify and get to understanding.
- It can help draw people out.

Even a "failure" is a success—you prevented a misunderstanding!

Synthesis statements often start with:
- I want to see if I'm understanding you correctly.
- It sounds like...
- I'm hearing that.....
- Are you saying.....?
- If I'm understanding you correctly....

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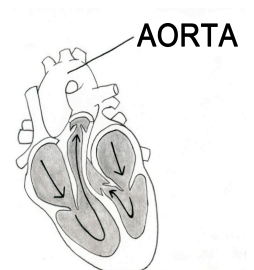
GROUP DECISION MAKING

| |
|---|
| 1. What's the problem or issue we need to address? (And is this important enough to use the whole group's attention?) |
| 2. Oh! This is the problem/issue (Already we are building alignment! We agree there is a problem we need to address.) |
| 3. How can we best address this issue/problem/challenge? (Divergent thinking! Don't panic! Just let them talk.) |
| 4. Narrow it down (NOW we are getting to proposal land.) |
| 5. Decide (We agree we believe this is the best way to address the problem we have.) |
| 6. Implement (Don't stop at a decision!) |

Note that a proposal is step four.
Many groups have rules that they will not talk about something until a fully fleshed out proposal is brought to the group. This can get frustrating when what is talked about is not what the group needs to be talking about to best meet its needs and address the issues it is facing. Also, you may see that the people who hold formal or informal power in the group end up bringing the majority of proposals to the group. This can reify power dynamics, contribute to burnout, and leave others feeling disempowered.

If there's conflict or tension, go backwards.
If a group is slipping into conflict or tension, it is often because they did not spend enough time in one of the areas beforehand, or did not spend ANY time on the areas beforehand. (Most often, we see that groups do not spend any time on identifying what the underlying issue is that they need to address).
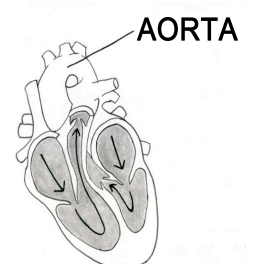
TIPS, TOOLS, TECHNIQUES

Some simple tools can drastically shift the energy of a meeting, help you hear new voices, and invite the perspectives of quiet, introverted, or silenced participants:

- Start the meeting with quick check-ins (even something as simple as "three adjectives to describe how you're feeling," or "one thing that went well and one challenge from the week") about how folks are doing, so you know where participants are at when they walk in the room.
- Build in a couple minutes for quiet journaling/thinking before launching into group discussion.
- Start an item off with conversations in pairs or small groups before coming back to the whole group. Often you'll get deeper this way and end up with better, more creative ideas.
- Do a go-around to hear from everyone. (People can always pass if they'd like.)
- Hosting part of a meeting with everyone standing in a circle (if they're able) can help wake people up, decrease tensions, and support more concise statements.
- Asking participants to switch seats after a break or agenda item also helps to energize and mix things up. This can be really helpful when they group is feeling stuck.
- Taking a straw poll can help you get a quick read of how close the group is to a decision, whether or not there is unity, and which topics are key to focus discussion on. You can check in with folks whose opinions diverge most from the majority to see what's going on for them. Straw polls can look a lot of ways:
  - Vote yes/no/maybe
  - Vote for your one favorite of multiple options
  - Vote for all the options you support (more than one is ok)
  - Rate how you feel about the proposal/idea by holding up fingers, with one finger meaning "I really do not support this," five fingers meaning "I love this."
- Incorporate ways of gauging people's opinions that **involve their bodies**, such as asking folks to move (if able) to one side of the room if they are for the proposal, the other side if they're against it, and to stand in the middle if they're unsure. Then, hear from a few people from each position. Let folks move as their opinions change.

TIPS ON NAMING, INTERVENING, AND ADDRESSING SYSTEMIC POWER

Name it when it's happening.

- "I'm noticing..."
  - "that I haven't heard from many people of color recently."
  - "that there's a lot of interrupting happening, and that it's happening along gender lines. I want us all to work to become more aware of that and change it."
- What you just said is hurtful to people.

Refrain from saying things that people hear as name-calling.
Rather than what you just said is "racist." You can say: "What you just said is hurtful to people." Or ask questions.

Ask questions to support self-inquiry.
- What makes you say that?
- Where did you hear that?
- What do you mean by that?
- Can you tell me more about that?
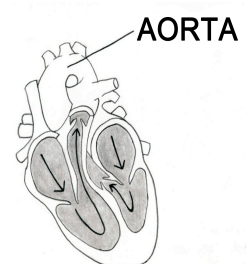
Support the leadership of marginalized voices.
- Allow people to respond on their own behalf.
- Synthesize. "What I heard from this person is this...."

Create space for those who we are not hearing from.
- I'm going to take a moment to see if anyone who hasn't spoken in a while has something to say.
- We've been hearing from a lot of men. Let's take a moment to see if any of the women, genderqueer, trans folks in the room have something to say.

## COMMON MISTAKES (WILL HAPPEN. KEEP AN EYE OUT!)
- Not having a co-facilitator when you need one.
- Rushing the group. (Sometimes going slower takes less time in the long run).
- Not setting clear boundaries for yourself in your role as facilitator, getting pushed around by the group.
- Not taking a break when YOU need one. (When the facilitator needs a break, it's to everyone's advantage to have a break!
- Spiraling down into group process about group process. (You know, when you spend 10 minutes deciding as a group by consensus whether you want to allot 10 more minutes of discussion to an item).
- Not leaving time and space for people's feelings.
- Becoming inflexible or unwilling to adapt the agenda/plan to meet the group's evolving needs.
- Forgetting to get additional support—a note taker, logistics coordinator, someone to set up the meeting space, etc.
- Meeting for too long a time period without food, water, and/or breaks.

RED FLAGS AND DYNAMICS TO WATCH OUT FOR
- Unhealthy, unchallenged, or unnamed power dynamics.
- People interrupting each other or the facilitator.
- People repeating or re-stating what others have said.
- Tone and body language: Do people look upset? Checked out? Bored? Angry? If you see this, check in with the group as a whole, or quietly with individuals.
- Individuals monopolizing conversation.
- Individuals or small groups bringing a fully-formed idea to the meeting, without any group conversation, brainstorming, or feedback, and wanting it passed that very day.
- Back-and-forths between individuals.

WHAT TO DO WHEN YOU GET STUCK
- Use the agenda and expected actions. Have you switched into "decide" mode when the desired action was "feedback?"
- Take a break: Have small groups work out a proposal based on what they've heard about the needs of the group. (What's needed for a decision?)
- Ask questions to initiate discussion, as opposed to jumping directly into concerns. Questions assume the proposal writer(s) thought about the concern, and allow them to respond with their reasoning.
- When people are voicing concerns, ask them what can be done to address their concern.

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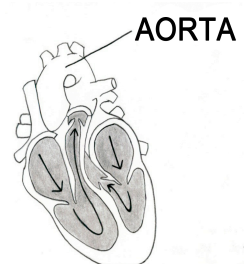
- Do people need a refresher about the decision-making process your group uses?
- Listen for agreement and note it, no matter how small. This both builds morale and helps clarify where the group is at.
- Reflect back what you're hearing. Practice synthesizing and summarizing.
- Break big decisions into smaller pieces.
- Don't allow back-and-forths between two participants to dominate a discussion or agenda item: ask for input from others.

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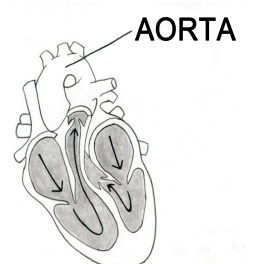
RESOURCES AND READINGS

- Collective Visioning by Linda Stout
- Facilitators Guide to Participatory Decision Making by Sam Kaner
- Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers by Dave Gray
- The Graphic Facilitator's Guide: How to use your listening, thinking, and drawing skills to make meaning by Brandy Agerbeck
- Solving Tough Problems: An Open Way of Talking, Listening, and Creating New Realities by Adam Kahane and Peter M. Senge
- Visual Meetings: How Graphics, Sticky Notes & Idea Mapping Can Transform Group Productivity by David Sibbet

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