GUIDE TO GREAT MEETINGS

TAMARACK INSTITUTE

By: Ritika Sharma Kurup (she/her)

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Gratitude and Attribution: The content and invitations in this guide are adapted from Results Based Facilitation: Book One – Foundation Skills – 2nd Edition: Moving from talk to action, by Jolie Bain Pillsbury, Ph.D.

Many additional excellent and no-cost RBF resources are available on the RBF website: http://rbfnetwork.com/new/resources-free/.

Land Acknowledgement: Tamarack Institute for Community Engagement is a national organization. Team members, board members, and network members live and work in communities across Turtle Island (North America) and around the globe.

Turtle Island (North America) has been home since time immemorial to Indigenous peoples of First Nation, Métis, and Inuit descent. We recognize that across this land Indigenous rights holders have endured historical oppression and continue to experience inequities that have resulted from the widespread colonialist systems and ideologies that perpetuate harm to Indigenous peoples to this day.

FROM TALK TO ACTION, ALONE TO ALIGNMENT, AND SEPARATE TO TRUST

By Danya Pastuszek (she/her), Owen Henderson (he/him) and, Ritika Kurup (she/her)

What do you recall about the conversations where you felt you belonged? Where you moved from misunderstanding to empathy for someone else's experiences? Where you worked with optimism on something you once thought to be impossible? Where all of your collaborators felt deep accountability to that result too?

Over the past two years, as wealth, climate, and education inequities have grown in Canada, those of us with wealth, institutional power, and social capital have had to make a choice. Will we retreat into what we can control directly, or will we seek to work with others to address increasingly inequitable outcomes?

At Tamarack, as in many networks across the world, we are choosing the latter.

This tool is one manifestation of that choice.

It is a practical, foundational guide to creating spaces where people can progress on audacious goals. (It is an introductory piece, and we encourage you to visit with other tools as well.)

* * *

When Jolie Bain Pilsbury published the **Theory of Aligned Contributions**, the two of us worked with large place-based coalitions to foster equitable education outcomes. Jolie's work offered language for things we were both experiencing. It offered evidence that groups can make measurable progress on big goals when coalitions of lived experience leaders and sector leaders:

1. Commit to a single, measurable goal and pay attention to the equity gaps in a defined geography.
2. Align their contributions by coordinating their actions.
3. Share power and become accountable to the goal and each other.

Like every model, it's based on some assumptions. Assumptions that inequitable outcomes persist because:

1. We focus on multiple results or no specific result, in ways that keep us separate from each other and foster competition.
2. We don't center lived experience and collaborate across sectors.
3. The seemingly intractable nature of the inequity stifles our sense of agency and our willingness to be publicly accountable.
4. We lack the capacities (including skills and time) to collaborate and facilitate difficult conversations that move us to aligned action.

What's in this toolkit focuses on how to facilitate spaces that allow us to get to aligned action.

In collaboration with the entire Tamarack team during the summer of 2023, we identified seven foundational ways to create spaces and conversations on which achievement of goals at scale depends. We call them invitations because they can't be mandated, only – well – invited.

1. Design for goals with relationships and resources in mind.
2. Define roles for self and for the participants.
3. Use check-in to establish the group's ownership of the meeting results.
4. Share work with the group.
5. Stay present and open with the group, practice inclusion, and give the work back.
6. Support the group's progress by using context statements and effective questions.
7. Capture, summarize, and synthesize the group's decisions and invite action commitments.

This toolkit is for facilitators who create spaces and conversations that enable groups to achieve equitable goals at population scale. It offers practical ideas and accompanying tools in how to operationalize these invitations, when to use them, as well as suggestions for how to integrate them into your existing practice. We invite you to explore, practice, and let us know what resonates, what's missing, and what you adapt. As with all of our work, the insights and lessons ultimately come from the experience of all of you who lead this work in community.

This guide supports our work of holding spaces where people can connect and find meaningful things to work on together, even when they think they're really different from each other. In the words of our partner De'Amon Harges: our work is to help people "fall in love with each other."

Now more than ever, our contribution is to create new structures and skills for people to be together, understand each other, and solve together. This guide is a tool for that work, that way of healing our world.

HOW TO USE THIS GUIDE

The purpose of this resource is to provide a brief summary for each of the seven core invitations and offer some tangible tools to support skill development in using those invitations. However, no resource alone is sufficient to build competence. Learning a new skill takes time and persistent practice.

Below, we offer some ideas that might support your development of sustained practice to achieve mastery.

- **Identify one invitation at a time** that you want to develop your skills in. Review the invitation and the resources offered under it and create a plan to practice that invitation consistently for a month.

- **Practice the selected invitation in all your formal/informal meetings** and conversations for the entire month.

- After each time you practice, **take 5–10 minutes to journal your reflections** on what worked well in your practice and what you might want to try next time.

- You might also **consider identifying a "practice partner"** who is also working on developing their facilitation skills and offer accountability and feedback support to each other.

- **Once you feel comfortable with one invitation, add a new one to your practice routine.** Chunking out your practice focus may prevent you from feeling overwhelmed.

TABLE OF CONTENTS

THE ROLE OF FACILITATION IN COLLECTIVE ACTION

The complex challenges of poverty, disparity, and climate change cannot be solved by any one organization or group. Solutions to these challenges require collective and coordinated action across stakeholders in micro and macro settings.

Intentional facilitation allows stakeholders to convene and collaborate to coordinate their actions.

This guide offers some key steps that facilitators and group participants can take toward catalyzing collective action.

"Alone we can do so little; together we can do so much."

– Helen Keller

FACILITATION: A PROCESS, NOT AN EVENT

Purposeful facilitation that moves groups to meaningful action is not just the work of the group during the meeting. Instead, facilitation is the full arc of the group's work, which includes intentional planning, communication with the group between meetings, well-run meetings, and follow-ups that hold group members accountable to their action commitments.

Phases of meeting facilitation	Key goals of each phase
Planning	- Clarify meeting/engagement purpose and goals. - Identify the right participants. - Develop a plan for how many meetings will be needed to achieve the desired results and what will be accomplished during each meeting. - Design the meeting space to ensure safety for all participants. - Design meaningful and flexible conversations.
Implementation	- Ground the participants in the meeting purpose. - Support the participants in developing relationships with each other and to the goals. - Pace and space effective conversations. - Manage the meeting to support full engagement from all. - Record action commitments made by the participants.
Follow-up	- Support the group to hold accountability for commitments made. - Maintain consistent communication between meetings to keep the members connected to and invested in the work.

INVITATIONS FOR GREAT MEETINGS

Although successful progress toward our collective goals requires us to pay attention to the full process of facilitation, the focus of the remainder of this guide is on seven invitations that are critical in supporting groups to make progress during meetings.

WHY INVITATIONS?

We believe that facilitation is a process that the participants of a meeting co-create to achieve their shared results. The facilitator(s) and participants bring lived and learned experiences to the work that inform their approach and engagement in a meeting. As a result, no two meetings are alike, even if the desired goals are the same.

Despite the uniqueness of each meeting, there are tools that can guide us in leading effective meetings that move groups from talk to action. The seven invitations offered in this guide are these tools. They are not a prescription to be followed in a specific manner, but are rather offerings that several practitioners and researchers have found useful in designing productive meetings. We invite you to use these invitations in a way that serves your desired goals.

"Now that we are part of the largest social justice movement in our lifetime, we will need even more facilitators, space holders, and magic makers who will ensure that we are joyfully and thoughtfully navigating our way to liberation."

- Ejeris Dixon, Facilitating Safer Spaces

INVITATION 1

Use Relationships, Resources, and Goals to Run Meetings

What does this invitation mean?

This invitation invites the facilitator(s) to answer the following questions:

- **Goals (results)**: What needs to be accomplished?
- **Relationships:** Who are the people with a relationship to these goals that need to be included? What is their relationship with each other?
- **Resources:** What resources do the participants have access to, and/or what resources will they need to fully contribute?

When and how to use this invitation

Use this invitation in both planning and facilitating your meeting.

During planning: Having clear goals is critical to ensure that you know who needs to be included in the conversation, why, and what they need to successfully engage. During the planning process:

- Develop clear goals that are achievable in the allotted time.
- Communicate the goals, an agenda, and any pre-work to participants ahead of the meeting.
- Ensure that the goal(s) of the meeting engage participants in collaborative work and not one-way information sharing only.
- Design a detailed agenda to support your facilitation process.

During the meeting: Centering your meeting on the goal provides focus to the group for their shared work.

- Start the meeting by naming the goal and naming why the participants in the room are part of the conversation.
- Support the group in collaborating and moving through the conversation in service of the goal.
- Manage conversations to ensure that all members feel engaged and supported in making their contributions.
- Summarize the group's progress and next steps before the end of the meeting.

EXAMPLES OF TYPES OF MEETING GOALS

Types of goals	What success looks like
Joined in the work	• Participants understand the purpose of the meeting. • Participants understand how they and others contribute to the meeting purpose.
Relationships strengthened	• Members of the group are able to lean in to difficult conversations in service of the meeting goals.
Ideas brainstormed	• The group co-generates ideas for collective action.
Process designed	• The group co-develops a roadmap for how they will achieve the desired goals, what the process will be, how they will make decisions, communicate, etc.
Feedback/input secured	• Participants freely share their ideas and lift up any conflicts or challenges.
Decisions made	• The group engages in productive discussions and reaches action steps that all the group members can agree on.
Action commitments made	• Participants make public and individual commitments to action to move the work forward.

Adapted from: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc.

MEETING AGENDA TEMPLATE

Proposed meeting goal(s):
- List specific and meaningful goals the group will come together to accomplish

Pre-work:
- Any materials that participants should read, consider, listen to, or look at before the meeting.
- Distribute the prework with ample time before the meeting. A minimum of a week before the meeting is a good rule of thumb for most meetings, but some might need more.
- Indicate how long it might take to do the pre-work.

Time Block	Agenda Item	Goal of the Section
XX:XX (include time zones)	**Activity:** Welcome, Meeting Context and Goals, and Check-In • Effective question. What question will connect the group to each other? To the goal of the day?	**Facilitator**: **Goal:** Group is ready to work toward the meeting results
XX:XX (include time zones)	**Activity(ies):** Add as many rows as needed to plan meeting sections • Context. (Give context that supports getting to the activity result. What do participants NEED to know?) • Design effective questions to facilitate the discussion.	**Facilitator:** **Goal:**
XX:XX (include time zones)	**Activity:** Synthesis, Check-out, and Action Commitments • Context statement. Acknowledge the group's work and move people to action. • Check out question. Transition to what's next in the work and encourage clear accountability. Who will do what, with whom, by when?	**Facilitator:** **Goal:** Group members leave with specific commitments to move the work ahead.

Adapted from: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc.

INVITATION 2

Define & Hold Roles

What is the purpose of this invitation?

Once a clear purpose and goals for the meeting are established, it is important for the facilitator(s) to purposefully plan who needs to participate in the meeting and what their role will be. This invitation utilizes two specific skills:

- **Defining roles**: Being clear about who has the views, experiences, and authority necessary to contribute meaningfully to the meeting goals.
- **Holding your role as a facilitator:** Clarifying one's role as the facilitator in creating a productive meeting space that engages all participants fully.

When and how to use this invitation

Use this invitation in both planning and facilitating your meeting. **During planning**:

- Utilize this invitation to **thoughtfully develop the composition of your meeting participants**, identify what resources they will bring to the conversation, and anticipate what challenges you might face. A composition analysis template, like the one offered in the resources section, can serve as a useful planning tool in the preparation phase.
- **Get clear on the role you will play as the facilitator**. Will you be neutral, or do you bring a specific interest to the discussion? If you have a specific point of view, what do you need to do to manage your roles as a neutral facilitator as well as a participant with a point of view?

During the meeting:

- Pay attention to the composition of the group during facilitation. **How do members relate with one another and manage conflicts?**
- Support those who may not feel that they have the authority to share an alternate perspective.
- **Stay aware of the roles you play** and create opportunities for the group work independently.
- **Give the work** of decision-making and problem-solving back to the group **by asking effective questions of them.**

COMPOSITION ANALYSIS MATRIX

Participant Name	Role	Organization	Relationship to the meeting result	Hope/ desires related to the goal	Potential challenges in relationship to the goal

Adapted from: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc.

"Role awareness is a precondition of effective results based facilitation skill development!"

– Dr. Jolie Bain Pillsbury

INVITATION 3

Use Check-ins & Check-outs

What does this invitation mean?

Check-ins and check-outs help groups stay connected to the purpose and goals of the meeting and keep the work moving forward.

- **Check-ins**: The purpose of a check-in is to connect the participants to each other and to the goals of the conversation at the start of the meeting.
- **Check-out:** The focus of a check-out is to synthesize the progress made by the group during the meeting and create space for each group member to make specific action commitments that will move the work forward after the meeting.

How to optimize this invitation

When used intentionally, check-ins and check-outs serve as powerful tools in making groups feel connected to each other and the purpose of the meeting. Below are some ideas for optimizing this invitation.

- **Allocate the appropriate length of time** for individual check-ins and check-outs, but pace participants. Let members know approximately how much time they have (a couple of minutes per person is usually sufficient, but use your judgement).
- **Provide targeted check-in questions** that support the members in building relationships with each other and the goal of the meeting.
- **With large groups, use small group check-ins**, huddles, breakout rooms, chat boxes, or other innovative tools to engage members.
- Allow ample time to **synthesize key themes** from groups' check-ins and check-outs.
- **Provide 2–3 minutes of journal time** before inviting participants to share their action commitments publicly.
- **Invite public declaration of action commitments** during check-outs. Verbalization of commitments with specifics of what they will do by when is critical to develop shared accountability among the group members.
- **Follow-up with with notes** and action commitments after the meeting.

Example Check-in Questions

The purpose of a check-in is to connect the participants to each other and to the goals of the conversation at the start of the meeting. Here are some examples of check-in questions that join people to each other (personal and interpersonal) and to the work (goals).

Check out Tool #3: Effective Questions.

Relationship-connections questions (personal and interpersonal)
- How are you showing up today?
- What does the group need to know about you to work well with you?
- What values do you bring to this work?

Resource questions
- What gifts, talents, or assets do you bring to this group?
- What is your learning style?
- What support do you need from this group to contribute your best work to this project?

Meeting-goal-connections questions
- Why is this meeting goal important to you in your role?
- If we are successful today, what will we accomplish in this meeting?
- What are your hopes for our time together in this meeting?

Adapted from: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc. P118

Example Check-out Questions

The focus of a check-out is to synthesize the progress made by the group during the meeting and create space for each group member to make specific action commitments that will move the work forward after the meeting. Here are some examples of check-out questions that mirror the structure of the check-in questions.

Relationship-connections questions (personal and interpersonal)
- In a word or a phrase, how are you leaving this space?
- What have you appreciated about the time we spent together?

Resource questions
- Share one takeaway from our time together and how it will serve you.
- What worked? What didn't work? What would you have done differently?

Meeting-result-connections questions
- On a scale of one to ten, how would you rate our progress toward the meeting results?
- What is your next step? What is one commitment you can make?

Adapted from: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc. P118

INVITATION 4

Share Work

What does this invitation mean?

- Sharing the work implies that the facilitator believes in the group's collective wisdom and trusts the group's ability to accomplish its results.

- Skilled facilitators serve as a partner to the group and support productive conversations without pushing their own agenda in the meeting.

How to operationalize this invitation

- As a facilitator, **remain committed to the process, but not attached to an outcome**. Set aside your personal interests.

- If you have a specific and strong point of view, **be transparent with the group** and share it early.

- **Create an equitable, engaged, and safe meeting space** where group members feel supported in doing the work.

- Design an agenda and conversation that **supports the group in making progress on its goals** without centering your own authority or expertise.

- **Pay attention to the power dynamics** in the group and encourage all group members to share their perspectives.

- **Stay open and curious** and invite group members to share divergent thoughts and ideas.

- Consider inviting meeting participants to **co-facilitate parts of the agenda.**

- When the group feels stuck, do not rush to rescue and do the group's work. **Embrace silence for ten seconds, then use curiosity, reflection, and effective questions** to give the work back to the group.

"The primary role of the group facilitator is to focus the group on its purpose and act as a guardian of the group culture."

Dale Hunter, The Art of Facilitation

ARE-A METHOD TO GIVE WORK BACK TO THE GROUP

Sharing the work back with the group is a critical skill in ensuring that the group members are owning the work and not looking to the facilitator to make decisions. The Acknowledge, Rephrase, Explore (ARE) technique introduced by Steven Jones and Victoria Goodard-Truitt is a helpful method of giving the work back to the group.

Acknowledge: Use verbal and non-verbal cues to convey listening.
- Use body language and listening noises to demonstrate attention.

Rephrase: Use active and empathetic listening skills to summarize where the group is feeling stuck.
- Offer your understanding of where the group is in your own words and check the accuracy of your understanding.

Explore: Use effective questions to help group members find a path forward.
- Ask open-ended questions and create space for group members to wrestle through the next steps.
- Get comfortable with silence.

Source: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc. P70

HOLD ROLE: WHAT GROUPS NEED FROM FACILITATORS

24

Groups almost always want	Groups sometimes want	Groups NEVER want
To focus on their task in the allotted time	Relationship building	A facilitator with their own agenda
Movement	Synthesis	
Inclusive Participation	Observations	

Source: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc. P63

INVITATION 5

25
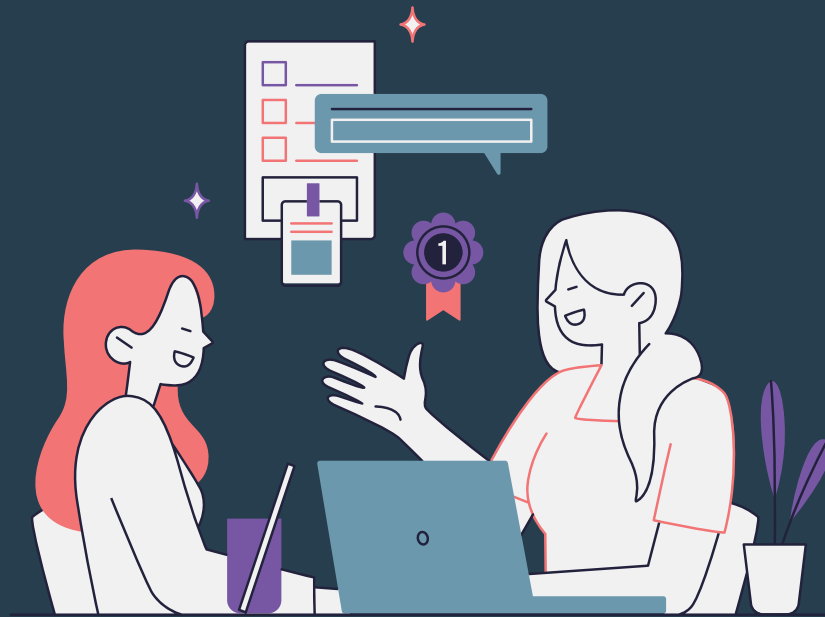
Be Present

What does this invitation mean?

- Authentic collaboration among group members requires the exchange, debate, and merging of ideas. This invitation underscores the importance of embodying full presence during your conversations to create trust, acceptance, and understanding in the group.

- Being present requires participants and the facilitator(s) to remain open and curious, stay focused on the results, and listen deeply and without judgement.

How to operationalize this invitation

- Support the group in **co-creating norms** that invite all members to practice appreciative openness to all ideas.

- **Create safety for divergent thinking** in the group.

- **Minimize distractions** for yourself and group members by appropriately designing the meeting space and agenda.

- **Listen to understand, not to respond.**

- In virtual settings, **invite group members to turn on their cameras.**

- During in-person meetings, **create brief technology breaks** to support full engagement during the meeting.

- **Interrogate your own filters and associations** as you facilitate and ask for clarifications instead of making assumptions.

- **Demonstrate focused attention** on participants through verbal and nonverbal cues.

"The practice of deep listening is the practice of open inquiry, without assumption or judgement."

Sharon Weil, ChangeAbility: How Artists, Activists, and Awakeners Navigate Change

STEPS TO MASTERING APPRECIATIVE LISTENING

Step one: Become self-aware of how you currently listen. Do you:
- listen to react and respond?
- formulate your responses before the speaker has finished their thought?

Or
- remain curious about what is said?
- demonstrate appreciation for the speaker with your verbal and non-verbal cues?

Step two: Recognize what to listen for by asking yourself the following questions:
- What are my assumptions?
- What preconceived ideas do I bring to the discussion?

Step three: Use open-ended questions to listen appreciatively and stay curious. Inquiry is an effective way to demonstrate curiosity and make thinking visible.

Adapted from: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc. P 81-82

GROUP NORMS FOR ENGAGEMENT

Support group members to co-create norms of engagement in the group to develop clear expectations and rules of engagement. Some sample norms might include the following:

- Be present and avoid multitasking.
- Stay on mute unless you are talking.
- Rename yourself in Zoom and add pronouns, if comfortable.
- Assume best intentions and own your impact.
- Listen for understanding.
- Be a learner (stay humble and curious).
- Be a scientist (ground your opinions with evidence).
- Take space, make space (everyone participates and everyone listens).
- No one has all the right answers - it is okay to disagree.

INVITATION 6

29

Give Context, Ask Effective Questions, and Listen for Responses

What does this invitation mean?

- This invitation creates a shared understanding and provides focus to group discussions by asking you to ground the conversation in context.

- Having a clear focus on the context, using effective, open-ended questions, and listening appreciatively to the members' perspectives creates conditions for group members to feel valued and productive and allows progress towards the goals.

How to operationalize this invitation

Give context:
- Provide a short and succinct background for the purpose of the discussion.
- Framing the conversation with a background allows the group members to focus on the issue and engage constructively.
- Example: "In the last meeting, we reviewed the data to understand the gaps in our services. Today we want to brainstorm ideas for how we can serve clients who we have not succeeded in serving in the past."

Ask effective questions:
- To support focused discussion, use open ended questions that draw group members to engage in the conversation.
- Example: "If you had a magic wand to create any programs and policies to support progress, what might you try?"

Listen for the group's ideas with a sharp focus:
- In a group setting, members rarely respond directly to the question at hand. Instead, members often build on each other's ideas and may have some tangential discussions. Therefore, it is important for the facilitator to listen to the group's discussion with a focus on the core purpose of the discussion and capture ideas as the conversation proceeds.

Tips for effectively using this invitation

Check out Tool #3: Effective Questions.

- State the context at the beginning of the conversation.
- Put effective questions in writing (on a flip chart/Zoom chat/slide) to keep the question in front of the group.
- Take notes on the group's responses in real-time so that participants can track the discussion visually.
- If the group is addressing different topics, create a "parking lot" section in your notes so that group members feel heard and so that ideas generated are not lost.
- If the group continues to address different topics/questions than the one you planned, stay flexible and curious. If re-direction is not working, it is important to explore what is keeping the group stuck and pivot to meet the group's needs.

Adapted from: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc. P 88

Crafting Effective Questions

- Start by discussing what you want to get out of the discussion or process.
- Work with partners or in a small group to write down several questions related to the topic.
- Discuss and rate the questions:
  -Which question is best constructed to promote reflection and creativity?
  - Which question has the right scope to achieve our end purpose?
  - What are the underlying assumptions embedded in each question?
- The goal is not always to make the question assumption free, but to make sure it has the right assumptions to move your group forward.
- Experiment with changing how the scope and construction of the question to get a feel for how this can change the direction of the conversation.
- Give each question the "genuine test" - Is this a question to which we don't already know the answer? If we already know the answer or have a pre-set correct response in mind, it will not spark a true inquiry conversation.
- Run the question by someone outside your group to see how well it works and where it leads the discussion.

For more information on crafting powerful questions, visit
Inspiringcommunities.org.nz

Source: Inspiring Communities, New Zealand . inspiringcommunities.org.nz/wp-content/uploads/2019/04/Crafting-Powerful-Questions_FULL.pdf

Capture, Sequence, Summarize, and Synthesize

What does this invitation mean?

- Group conversations are not linear and can cause participants to lose track and feel disconnected. Therefore, it is important to visually capture, sequence, and summarize ideas generated and decisions made as conversations progress in a meeting.

- Synthesis is a skill that enables the facilitator to organize the group's discussions, find convergences and divergences in the ideas shared, and support the group to move to the next step of the work.

How to operationalize this invitation

Capture:
- Take clear notes on a flip chart, chat, or other technological tool to track progress, and keep them in front of the group visually.
- Organize the notes clearly to capture topics, ideas, decisions, and future discussion points.

Sequence:
- Group conversations may jump from one topic to another. Establish a sequence of speakers, conversations, and work to help the group focus and move the work forward.

Summarize:
- Use focused listening to summarize the group's discussions.
- At minimum, always summarize issues/challenges surfaced and decisions and action commitments made by the group.
- Share your summary with the group and check for accuracy.

Synthesize:
- Support the group in getting to decisions by naming the crux of the conversation.
- Always check with the group if your synthesis resonates or not.

"Synthesizing: turning all of the best ideas into something greater."
–Autumn Brown,
Consensus Reflection

Tips for summarizing

| Do	Don't
Summarize all points of view in the room, even those held only by a few or those that cause discomfort or conflict in the group.	Lose track of what people are saying. If possible, recruit a partner to co-facilitate and take notes during the meeting.
Name and visually capture ideas generated by the group so that they can track progress.	Ignore minority or controversial points of view.
Be brief in summary to capture highlights. Too much detail can overwhelm and disengage the listeners.	Bog down the group in reliving the whole conversation. Focus on highlights in your summary.

Source: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc. P 108

Tips for synthesizing

Do	Don't
Pull yourself up from the conversation and ask yourself "What is this conversation about?" Listen for the 'heart of the matter.'	Focus on your own takeaways and ignore divergent thoughts from the group.
Take notes for the group using technology or flipcharts to support visual learners and document the discussion and decisions made.	Use your power as the facilitator to rush the group in a specific direction.
Engage other members of the group to offer synthesis	Neglect sharing your synthesis with the group and checking for accuracy.
Practice offering multiple hypotheses based on your synthesis for the group to react to and move the work forward.	Forget to tend to the emotions and feelings of the group. Moods and emotions are critical in determining the capacity of the group to work together and move to action.

Source: Pillsbury, J. B. (2015). Results based facilitation: Moving from talk to action. Sherbrooke Consulting, Inc. P 112

WHEN THINGS DON´T GO AS PLANNED
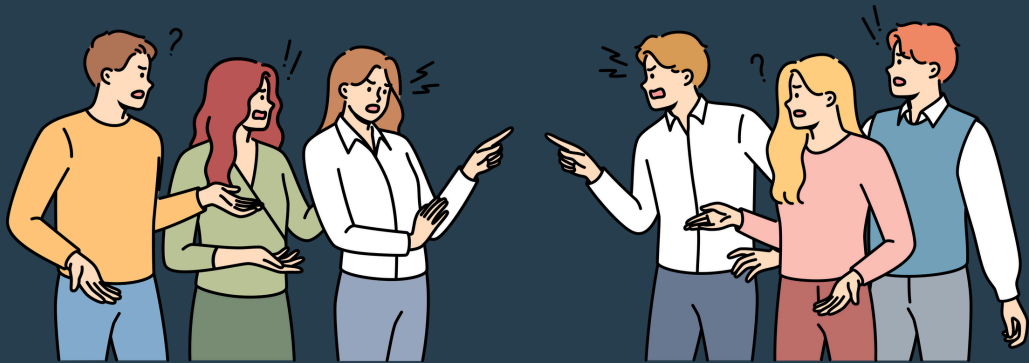
Addressing some challenging scenarios

TIPS FOR SOME CHALLENGING SITUATIONS

Collaborative work, especially in service of audacious goals, can be challenging. Conflict, disengagement, and power dynamics often threaten meeting success. Below we offer some tips for addressing some common meeting challenges.

How to manage participants who dominate the meeting

- **Set up group norms** at the start of the meeting to create clear expectations of participation.
- **Create multiple ways of engagement** during the meeting - individual reflections, small group work, a learning wall, etc.
- **Explicitly invite those who have not spoken yet** to contribute first.
- Use time allotments/**"talking sticks"** to ensure that all participants get a turn to speak.
- If the dominating participant creates issues consistently, consider discussing the problem with them **one-on-one before or after the meeting.**

What to do when group members do not share in the work

If participants are not making commitments to action in a meeting, it often implies two things - either they do not feel co-ownership of the goal, or they do not believe they have the authority to move the work forward. Explore what might be true for your group.

- **If group members not bought into the shared vision**: Assess if you as the facilitator have been holding too much decision making power. Review invitation 4 (share work) to reflect on how you can share the work with the group.
- **If group members do not feel authorized to execute the vision:** Pay attention to the composition analysis of the meeting before inviting participants (see invitation 2- define and hold roles). Identify what support participants need from you to feel authorized to move the work forward and invite each participant to make action commitments at the end of each meeting (invitation 3 - check-ins and check-outs).

What to do when the group feels overwhelmed and stuck with challenging socio-political environment

- **Acknowledge the current reality** and the limitations it imposes on progress.
- Help the group **activate hope** by using reflection check-in questions that ignite optimism.
- Support the group in identifying what is the **next small yet meaningful action** (low hanging fruit) that they can take in support of the larger goal.
- Remind the group that structural inequities have been in the making for centuries, and dismantling these inequities is a **long process.**
- **Keep stories of those impacted by the work in front of the group** to maintain a sense of urgency and commitment despite the challenges.

How to manage group conflicts

Conflict is a part of life and critical to address in collaborative work. Unfortunately, when it inevitably arises in groups, it often destabilizes facilitators and participants alike. Productively managing conflict is critical for successful collective action work. Some steps that might be helpful are listed below.

- **Normalize conflict** by naming its possibility in any high-stakes conversation.
- **Create norms** for disagreements and addressing conflicts from the start, before the emergence of conflict (see the resource on group norms on page 23).
- **Use Tamarack's guide to creating safe meeting spaces** to ensure that a conflict doesn't spiral into harmful actions toward any group members.
- **Support members in respectfully sharing their diverse perspectives,** but remain prepared to interrupt any individuals and/or behaviors that threaten safety of any group members.

"I name facilitation and mediation as ways the spirit moves towards justice!"

\- Adrienne Maree Brown