



Part One: Get Ready > 4. Prepare yourself to facilitate.

## PREPARING FOR THE PROCESS OF CONVERSATIONS

Your role in designing and guiding the process has multiple dimensions and responsibilities. Creating a well-designed process and keeping people in it increases the likelihood that the experience will be of service and a gift to the group.

The guidelines below describe ways to prepare before and engage during meetings. We think of meetings expansively—any time two or more people get together virtually or in person to share information, make decisions, or take action. So a phone call or video chat between two or more people is just as much a meeting as an in-person discussion with 20 participants. Meetings can be simple, informal conversations over a meal or formal, structured processes in a conference room.

The tips below are scalable for groups of different sizes in different settings. The key is to think through how you'll guide the meeting before you're actually in it.

### BEFORE THE CONVERSATION AS PART OF YOUR OVERALL MEETING PREPARATION:

- **Link the conversation to an overall strategy.** Be clear in your own mind about why focusing on race, equity and inclusion is important for the success of the group/organization. Understand how this focus relates to the work that the people in this group/organization are already doing. Be sure to understand who is sponsoring or calling for the conversation and why they think it's important, as well as other points of view.
- **Assess the group's readiness** for the conversation. For instance:
  - ▷ What troubleshooting needs to take place before the group can move ahead on this issue? Are they ready to focus on issues beyond interpersonal racism?
  - ▷ If the group is weak on the basics of collaboration, listening, or consensus building, consider implementing the skills of "Collaboration 101" in order to develop the skills to have complex conversations. (e.g., listening for understanding, withholding judgement, productively exploring alternative points of view)
  - ▷ If the group tends to avoid conflict, consider beginning with a simpler conversation that can build skill and experience handling multiple viewpoints and conflict before beginning a collective dialogue about race. Progress strategically toward conversations about race as the group builds skill.
- **Help participants understand the whole process and how individual conversations fit into it.** What is the series of discussions, workshops and other activities related to race, equity and inclusion? What are your plans for next steps after this specific conversation? Be clear about how decisions will be made throughout the process.
- **Establish a clear focus and goals for each meeting.** Don't try to take on everything in one conversation. Make sure you have clear desired outcomes (e.g., a shared understanding of XYZ; a prioritized list of issues and concerns to address in the future; an agreement to make race, equity and inclusion an explicit priority; a list of action items for the next six months)
- **Prepare to involve a broad range of stakeholders** in the series of conversations about this work. Identify or seek volunteers who have varying views to work with you to design your meeting(s) or planning process.
- **Be sure to consider and address logistics and language needs** from the viewpoint of different stakeholders and the cultures from which they come.
- **Be sure that the materials (e.g., pre-reading, handouts) and activities are appropriate** for the audience. Design for the whole person, both left and right brain. For the left brain, create structured conversations and offer supporting materials or information. For the right brain, use creative activities and tools such as art projects, films, storytelling, or hands-on experiences.



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## PREPARING FOR THE PROCESS OF CONVERSATIONS, CONT.

### DURING ANY CONVERSATION:

- **Begin by building an agreement about meeting norms** or ground rules together. Suggest “ouch.” If a person is offended or hurt by something that’s said or done, they should say “ouch” and explain the impact in the spirit of creating a teachable moment.
- **Create opportunities for relationship building** within the dialogue (e.g., opener/ice breakers, paired activities, small group conversations) that enable participants to discover interests or experiences they share.
- **Keep the conversation on track** before beginning by ensuring agreement about the process, roles and desired outcomes; clarifying the process along the way; reflecting back what is emerging in the conversation; and using the agenda as a guide to help the group achieve its desired outcomes.
- **Intervene as needed** to get the conversation back on track. Be sure to tailor the interventions as appropriate to the group.
- **Expect that some (possibly many) people will feel uncomfortable** at different moments during conversations about race. Help the group progress in the midst of discomfort by:
  - ▷ Reinforcing the group’s norms
  - ▷ Inviting people to make “I” statements and own their viewpoints (rather than saying things like “we all know that…” or “it’s clear that…”)
  - ▷ Acknowledging the difficulty and pain associated with the conversation and creating space for people to pause, reflect and even briefly disengage if necessary in order to take care of themselves
  - ▷ Encouraging people to separate the search for understanding from assessing, judging, agreeing, or disagreeing
  - ▷ Modeling respectful listening
  - ▷ Offering clear, useful feedback to individuals and the group
- ▷ Reminding people that the problems are historical in nature and reinforced by policies; people are not bad but many policies (re)create inequities
- ▷ Designing a mix of small group and large group conversations to enable people to share their thoughts and feelings in different settings
- ▷ Creating opportunities for people to connect with one another and reflect on and connect with their own sources of power and purpose
- ▷ Designing a physical space that creates familiarity and comfort for participants
- ▷ Balancing power dynamics by inviting people to self-manage their participation to share the air space; noticing and intervening if a few people tend to use a lot of air time or frame the conversation; actively encouraging participation, especially from quieter participants:
  - by design choices (e.g., round robin, when you move around the circle to take comments from each person rather than a brainstorm when people jump in randomly)
  - by direct invitation (e.g., “let’s hear from some of the folks who haven’t spoken in the past 15 minutes”)
  - Be aware and remind the group of the difference between intent and impact. Help group members to educate one another about the impact of their words and actions.
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Source: Interaction Institute for Social Change. May be used and reproduced by local United Ways for non-commercial use, with attribution. This tool was developed based on experiences of many IISC consultants with the countless organizations and individuals we have served over the years and the colleagues in many fields from whom we have learned. The original idea for this piece grew out of an 18 month learning process about facilitating dialogues about race that IISC facilitated for a group of community development practitioners, funders and intermediaries convened by the Local Initiatives Support Corporation—Boston office and the Massachusetts Association of Community Development Corporations, which was supported by Third Sector New England’s Diversity Initiative. The section on preparing oneself to serve was influenced not only by IISC’s ongoing internal learning processes about the love that does justice and spiritual leadership, but also by our work with the Sisterhood for Peace: Transforming Sudan project of My Sister’s Keeper and coach and colleague Selena Sermeño.

<sup>26</sup> For more information and opportunities to practice preventions and interventions, consider attending IISC’s workshops, Essential Facilitation® or Facilitative Leadership®. Visit IISC at [www.interactioninstitute.org](http://www.interactioninstitute.org) for more details.