

TOOL KIT FOR THE FACILITATOR

Thank you for leading your team as the facilitator. Your job is to make it easier for everyone else to do their jobs. You accomplish this by doing the following.

- Running effective meetings with goal-oriented agendas that ensure fairness (equity).
- Overseeing the exchange of academic feedback.
- Taking the lead on formal presentations.
- Resolving conflicts that arise on the team.

Your efforts will allow your peers to take personal and academic risks as they collaborate to generate high-quality work.

This role requires that you draw from a complex set of social and emotional skills during meetings and moments of conflict (Ritchie, Parker, & Kirchner, 2020). When you do so successfully, you can make it look easy for your team to make progress toward its goals in a positive, productive environment.

Contents

Role Responsibilities and Resources	2
Team Meetings.	3
Conflict Resolution	4
Agenda.	7
Meeting Facilitation Prompts	9
Questions to Consider Prior to a Hard Conversation.	10
Protocol for a Hard Conversation	11
Conflict Reflection	12
Emotions Conflict Reflection.	13
Indignities Exercise.	14

Role Responsibilities and Resources

In this section you get an overview of your responsibilities and the resources in this tool kit. These resources will help you meet the expectations for your role. You might use some of the tools regularly, while using other tools only in certain situations. Some you never need to use at all. You can revise these tools so they work well for you or replace them with tools you make yourself. Use them strategically.

- **Leadership Responsibilities Overview:** Leading team meetings and discussions; facilitating feedback sessions; ensuring balance of voice; ensuring quality of work; and resolving conflict
- **Leadership Condition:** Safety to take risks
- **Leadership Practice:** Exchanging feedback
- **Tool Kit Topics:** Divided into two topics used to support (1) team meeting facilitation and (2) conflict resolution

You will use most, if not all, of these tools.

- Use the **“Agenda”** (page 7) to plan efficient, equitable meetings that run on time.
- Use **“Meeting Facilitation Prompts”** (page 9) to uphold team norms.
- Use **“Questions to Consider Prior to a Hard Conversation”** (page 10), **“Protocol for a Hard Conversation”** (page 11), **“Conflict Reflection”** (page 12), and **“Emotions Conflict Reflection”** (page 13) to handle conflict on your team.
- Use the **“Indignities Exercise”** (page 14) when team members perceive that things on the team are unfair. This tool can help you identify ways to restore their dignity on the team.

Team Meetings

You handle many of your responsibilities by running regular team meetings. First, set up a schedule for cycles of full-team meetings and individual check-ins.

FULL-TEAM MEETING CYCLES

The whole team should gather on a regular basis. Create an agenda. It should evolve to cover a certain chunk of time (for example, two weeks) with different items at the beginning, middle, and end of the cycle. Start planning with “Agenda” (page 7). Then, add the appropriate items from the agenda to the template from the following figure, depending on whether the meeting is taking place at the beginning, middle, or end of the cycle. The following figure has examples of agendas for a cycle of full team meetings.

Start-of-Cycle Team Meeting Agenda
<ul style="list-style-type: none"> • Warm open (Motivator) • Priorities for the week (Project Manager) • Updates on and requests for support, resources, opportunities (Advocate) • Action steps summary (Facilitator)
Mid-Cycle Team Meeting Agenda
<ul style="list-style-type: none"> • Warm open (Motivator) • Status check and suggested workflow adjustments (Project Manager) • Status check on team morale, introducing any new emotion words (Motivator) • Shoutouts and questions based on “Daily Team Reflection” (Motivator) • Updates on and requests for support, resources, and opportunities; updates from weekly meeting with the teacher and other advocates (Advocate) • Action steps summary (Facilitator)
End-of-Cycle Team Meeting Agenda
<ul style="list-style-type: none"> • Warm open (Motivator) • Reflections on progress (Project Manager) • Reflections on morale (Motivator) • Observations about the team process based on completed team goals, team strengths, and struggles from “Team Contract” (Motivator) • Share and debrief team scores on “Team Leadership Assessment” (Motivator) • Updates from other team members • Action steps or updates to norms (Facilitator); updates to strategies (Project Manager); shifts to improve motivation or morale (Motivator); or new supports, resources, or opportunities needed (Advocate)

You are not responsible for addressing each item on an agenda. Rather, as you create an agenda, you are creating space for each team member to provide updates on their areas of responsibility. For example, the project manager is responsible for coming to meetings with updates on the team’s progress. If the team needs to have a longer conversation about any topic, like looking at data together or unpacking a bigger problem, protocols like those at the Center for Leadership and Educational Equity (www.clee.org/resources) can walk your team through those conversations.

As the facilitator, you ensure the following things.

- Conversations stay on topic.
- The meetings run on time.
- Everyone observes the norms.

The “Meeting Facilitation Prompts” (page 9) offers you helpful language to draw from to maintain norms. Review these prompts before meetings so that you are prepared to call on that language in the moment when it is helpful.

INDIVIDUAL CHECK-IN AGENDA

In addition to the full group meeting, research shows that we benefit from one-to-one check-ins and that it matters how often we have them. Schedule individual check-ins with each team member about once a week, or at least every 11 days (Beard, 2022). Individual check-ins don’t have to be lengthy or overly burdensome to plan. In fact, shorter helpful meetings are preferable (Buckingham & Goodall, 2019). Use a version of these simple questions to guide your individual check-ins agenda.

What are you working on? How can I help?

DAILY TEAM CHECK-IN AGENDA

Finally, you may wish to start each collaboration period with a very quick check-in. If so, use the following agenda.

1. Each team member quickly shares an emotion. The motivator gathers data about team morale by capturing the number of responses by quadrant using the “Team Morale Report”.
2. Each team member states what they accomplished the period before, what they plan to accomplish today, and what they might need help with. The project manager takes notes as needed.

Team members do not address the requests for support in the meeting. Instead, team members who have capacity to help offer to follow up after the meeting to make a plan.

Conflict Resolution

Having hard conversations is one of your most challenging jobs, but is also one of the most rewarding. Engaging in conversations that may involve unpleasant emotions is necessary to repair relationships and move forward. As conflicts arise and you support teammates to process their experiences, have them add their own tendencies and strategies to their individual strategy banks, adding new categories as necessary. Get familiar with the conflict resolution techniques and tools below so you can use them to support conflict resolution.

RESET

Often, teams just need to reset to interrupt negative energy (MacDonald, 2023). If your team is getting off track, call for a reset. Ask your team to pick a reset strategy from the list below or to suggest another idea. Then, add that strategy to your team contract as a way to Persevere.

The reset strategy bank includes this list.

- Shift from talking to writing.
- Do a mindfulness activity.
- Change the task.
- Listen to a favorite song.
- Get moving.
- Pause the frustrating discussion or task and come back to it later.

Use the following language to call for a reset.

It feels to me like our energy needs a reset. Would others agree? On our contract, we agreed to reset by [name agreed upon strategy, for example taking a movement break. How would that sound right now? OK, let's try that and regroup in two minutes to see if we can get back to work with better energy.

HAVE HARD CONVERSATIONS

When you need to facilitate a hard conversation, either between team members or one-to-one with a team member, select a tool from this list that fits your needs.

- Use **“Questions to Consider Prior to a Hard Conversation”** (page 10) with team members who are in conflict with each other to complete individually before they talk together.
- The **“Protocol for a Hard Conversation”** (page 11) supports you, the facilitator, as you guide two team members in a conversation about their conflict.
- Give team members **“Conflict Reflection”** (page 12) after a conflict to help them understand how they approach conflict and consider alternative ways to approach similar conflicts in the future. The model is based on five strategies for conflict resolution (Thomas & Kilmann, 1977).
- Use **“Emotions Conflict Reflection”** (page 13) to diffuse strong emotions. This tool helps team members honor their emotions and imagine those of others.

After each team member reflects on their own point of view and imagines how others felt, if it feels like people are ready, ask team members to go around and share. Offer them the prompts at the bottom of the tool for the discussion.

You can use the “Indignities Exercise” (page 14) to address concerns when team members perceive that things on the team are unfair. Examples of perceived indignities include someone rolling their eyes or laughing at someone, someone speaking negatively about or to a team member, or someone on the team not being granted a request.

CIRCLE BACK TO CONFLICT

After you have tried any of the conflict resolution strategies, circle back in your next team meeting or individual check-in to debrief the experience by adding *Circling back* to the agenda and using the prompts below to support the conversation.

I added this to the agenda (or called this meeting) to give us a chance to revisit what happened on [date], when we needed to reset. One of our norms is designed to make sure we all stay connected. It's important for me to support that norm, because [add your reason].

- *How are we feeling now?*
- *How did that reset (or reflection) work? What could we try next time in a similar situation?*
- *Is there anything we can do better so we don't need to reset again?*
- *What shift to our norms might you suggest?*

Call a meeting with the involved parties or individuals and add *Circling back* to the agenda. If the whole team needed a reset, include everyone in the discussion. If the conflict still seems charged, you can meet with the involved team members individually.

SEEK ADDITIONAL SUPPORT

Every organization has layers of support for a reason. If you would like more support when helping resolve conflict, ask the teacher or another adult for help. Communicate to your team that you are asking for help so your teammates are not surprised or make assumptions about why you have done so. You can use the following language as an example of how to communicate that information.

We are experiencing an ongoing team conflict. I feel like we have been trying to resolve this issue on our own, but that we would benefit from more support. I am hoping the teacher can help us figure out how to move forward. I'm going to call them over to ask for help when they are available.

Agenda

Team logo
Team mantra
Team members
Planned time for meetings
Meeting purposes

REPRODUCIBLE

Process: The facilitator creates and shares an agenda two days before a meeting. Team members can add items in advance or during.

Diffusion: Rotate taking notes. The advocate may share notes with other teams and gather feedback from their advocates during their regular check-in meetings.

Team Meeting Notes: List resources for anchor reference material.

Parking Lot: List important but off-topic agenda items to return to another time.

Norms

Roles

Facilitator: _____

Advocate: _____

Project Manager: _____

Motivator: _____

Agenda

Date:

Meeting goal:

Revisit action steps from last meeting.

Provide updates. (Add the appropriate agenda items, depending on where you are in the cycle.)

Below, document every action step and who is responsible for each and by when.

Action Steps	Responsible Party	Deadline

Meeting Facilitation Prompts

As you facilitate meetings, use the language in this tool to uphold the following suggested team norms. Edit the provided language to incorporate your own voice.

Norm: Demonstrate appreciation and foster culture.
<p>"Thank you for sharing."</p> <p>"Today we upheld our values by ..."</p> <p>"Today we upheld our norms by ..."</p> <p>"I am motivated to be on this team because ..."</p> <p>"Let's open (or close) with our mantra."</p>
Norm: Ensure equity of voice in contributions and decisions.
<p>"We haven't heard from ... Would you like to add anything?"</p> <p>"I am going to pose a question and then give two minutes for individual thinking and writing time before hearing any responses."</p> <p>"What else could be true?"</p> <p>"Let's pause and look for other options before moving on."</p> <p>"Is this our best work? How can we ensure we are fully capturing the spirit of what's being asked?"</p> <p>"Let's all think about how we would feel if we chose to ..."</p>
Norm: Maintain focus on the goals and timing set for the meeting.
<p>"I appreciate hearing all sides on this item. To ensure we close on time, I'm going to move us to the next item."</p> <p>"This discussion feels important, but it's not on today's agenda. Let's move it to the parking lot and come back to it if we have time in our next meeting."</p> <p>"This really impacts two of us, so let's finish this conversation outside of the meeting."</p> <p>"I appreciate the joy in the side conversation, but I am going to bring us back to the agenda."</p> <p>"Are we ready to shift?"</p>
Norm: Maintain a solution and action orientation.
<p>"To recap what I heard in that agenda item, Is that right?"</p> <p>"To close out this item, it sounds like our action step is ..."</p> <ul style="list-style-type: none"> • "Are we clear on who is doing that?" • "Are we clear on when this needs to be done?" • "Project manager, would you add that to our calendar?" • "Advocate, would you follow up?" • "I'll follow up with you outside the meeting to see how I can support progress."

Questions to Consider Prior to a Hard Conversation

What are my goals for this discussion?

What would a successful discussion look, sound, and feel like?

What is a factual account of my subjective experiences? What did I hear, see, think, and feel?

What emotions am I bringing to this discussion? How can I productively share my emotions with others in the conversation?

What assumptions have I made about the other person?

If I let go of these assumptions, what are alternate explanations for the other person's behaviors?

What do I hope to say in this conversation?

What do I hope to hear in this conversation?

Protocol for a Hard Conversation

Follow these directions to facilitate a conversation to resolve conflict between two team members.

1. Each participant shares their goals for the conversation.
2. Participant 1 shares their experience.
 - Participant 1 uses subjective language (I heard, I saw, I thought, I felt).
 - Participant 1 avoids making claims about the other person's intentions.
 - Participant 1 asks, "What thoughts or feelings do you have after hearing my side of things?"
3. Participant 2 shares their experience.
 - Participant 2 uses subjective language (I heard, I saw, I thought, I felt).
 - Participant 2 avoids making claims about the other person's intentions.
 - Participant 2 asks, "What thoughts or feelings do you have after hearing my side of things?"
4. The participants identify where their experiences overlap and where they differ. They may also share what they have learned from the discussion.
5. The participants discuss what action steps each party can take to repair damage and to move forward productively.
 - A helpful question might be, "What do we each need to feel good moving forward?"
6. The participants agree on a path forward.

Conflict Reflection

Researchers talk about five ways to handle conflict (Thomas & Kilmann, 1977).

1. **Avoiding:** Refraining from addressing the issue
2. **Accommodating:** Meeting the other party's needs instead of your own
3. **Compromising:** Seeking a solution that partly meets the goals of each party
4. **Competing:** Trying to meet your goals at the expense of the other party's goals
5. **Collaborating:** Working together in hopes of finding a solution that meets everyone's goals

Use this space to reflect on your own actions in a past conflict with these five strategies in mind and consider how you can use these strategies to engage in more productive conflict in the future.

Briefly describe the conflict.
Which of the five strategies did you use?
What did using that strategy look like?
What was the result?
Is there a strategy that you would like to have used?
What would using that strategy look like, and what do you think the result would be?
Consider action steps. What can you do now to move forward?
What can others do to support you in moving forward?
What have you learned from this experience?

Emotions Conflict Reflection

Use the space below to reflect on a past conflict, how it felt for you, and how you imagine it felt for the others involved. Use the mood meter to identify emotions. Use the sentence stems below if they are helpful in elaborating on your responses.

- I felt ... because ...
- I imagine others may have felt ... because ... so we could ...
- I heard ... say ...
- I felt ... when I heard that ... so I think we could ...

What happened? What did I do?	
How did I feel? Why do I think I felt that way?	
How do I think others felt? Why do I think they felt that way?	
What can we do now to address what happened, restore our connection, and move on?	

Indignities Exercise

List each moment you felt your dignity was violated. Include even small acts that made you feel unappreciated or disrespected. This tool is based on Frances X. Frei’s work, who helps organizations that are facing problems in their culture (as cited in Flint, 2022).

Indignities	Dignities
How could we turn these indignities into dignities? What could we do so that everyone feels valued? Record ideas for repair in the Dignities column above.	
Are there any adjustments to our norms that we could try?	

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