



Group Dynamics, Safe Spaces, and Facilitation

➤ Every group needs what we call here a “facilitator” – someone to think through the purpose of the meeting ahead of time, arrange the logistical details, guide the conversation from agenda item to agenda item, make sure everyone is heard, and start and end on time. (And maybe even be responsible for bringing snacks!)

And yet, in every giving circle, the structure and responsibilities of this facilitator are slightly different. Some groups divide responsibilities between several members, others rotate responsibilities meeting by meeting, and still others have paid or external facilitators who are not members of the circle. All of these

models have strengths and weaknesses. Volunteer facilitators who are also circle members need to experiment with how to objectively lead the group forward while also ensuring that their own voice and vote are counted. External or paid facilitators need to focus on objectively guiding the group, without bringing their own biases to bear on the decision-making.

No matter which model your giving circle follows, it helps to have a general understanding of how groups form and evolve, a sense of the importance of having ground rules for your group, and some key tips for the facilitator, whoever s/he may be.

Group Dynamics

➤ Much has been written about how groups (or teams, families, neighbors) come together. In his 1965 article, “[Developmental Sequence in Small Groups](#)” (Psychological Bulletin 63 pp 384-399), psychologist Bruce Tuckman used the following framework to describe the evolution of successful groups from startup to aligned performance:

Forming →

In the Forming stage, people are just getting to know each other. They act politely, want to be accepted by others, are just learning about each other and their shared task. Logistics are easier for the group to deal with than deep conversations, which might lead to controversy or conflict. It’s important to have a strong leader in this stage who can make everyone feel comfortable, include all voices, and be the one to move the group forward.

Storming →

When people are more comfortable with each other, the group is likely to move into the Storming stage. People are more honest and open with each other, and will disagree and even challenge each other’s perspectives. Tolerance, patience, and respect are paramount if the group is going to move beyond this sometimes unpleasant and even painful stage. Some members may drop out at this stage if the conflict is too much for them – if they feel attacked or unwelcome. Leadership at this stage primarily means setting an open, warm, respectful tone and guiding the behavior of the group – reminding members of the importance of respectful and mature dialogue.

Norming →

The group moves into the Norming stage when members can agree on shared values, goals, mission, vision. Not everyone will find their opinions reflected 100% in the group – but everyone is satisfied “enough” with the group’s direction. Personal preferences are sometimes sacrificed for the good of the whole. The group begins to function as an entity: to work for the achievement of shared goals. Leadership at this point may be more distributed – members trust each other and do not need a single facilitator/guide.

Performing

The group becomes a Performing group when it functions successfully as a single unit, accomplishing tasks effectively. Members and sub-groups can function autonomously, with the good of the group in mind. Disagreements still arise, but they are handled maturely and according to shared goals. The group’s original leader(s) can now step back almost entirely into a participant’s role, since the group makes collaborative decisions.

Safe Spaces

➤ Your giving circle should be a place where all members feel their voices and opinions are wanted and valued. Encouraging all group members to practice active listening is vital for creating an environment where all members of the group feel respected and heard. When actively listening, people give the speaker their full attention and strive to truly understand the speaker's opinion, needs, and feelings.

Many groups set up Ground Rules early on to articulate exactly how they hope members will behave in meetings. For example:

- Be honest
- Listen actively - respect others when they are talking
- Listen respectfully - even if you disagree
- Avoid prejudicial comments
- Criticize the idea, not the person
- Use "I" statements - speak from your own experience rather than generalizing
- Don't interrupt
- Be brief
- Everything is confidential
- Agree to disagree
- Don't be a jerk!
- "Step Up, Step Back": encourage participants who don't talk much to "step up" (speak up, participate), and those who participate a lot to "step back" (say less) to make room for everyone's opinions

The Union of Reform Judaism and Jewish Teen Funders Network's Philanthropy Project created a list of active listening principles rooted in Jewish values:

Shema: Listening - Mutual listening and curiosity

Kavod: Dignity - Fundamental dignity of all humans, respect for the physical, emotional, spiritual and well being of our peers

Hochma: Wisdom - Persistent seeking of knowledge, especially from those whose views differ from our own

Rachamim: Compassion - Finding softness in ourselves to extend mercy to others

Petichat Lebi: Openness - Receptivity to being transformed by new encounters and ideas

Facilitation Tips

Facilitating giving circle meetings is like facilitating any group of people who need to make group decisions and build relationships with each other: it's challenging, requires emotional intelligence, and is often the fuel that keeps meetings running smoothly and groups moving forward. It's especially challenging if the facilitator is also a member of the circle - in which case it might help to rotate this responsibility meeting by meeting.

There are a wealth of resources available online, in workshops, and in books about how to be a successful facilitator. Here are some tips adapted from [The Role of a Successful Facilitator](#), by David Ferrera.

- Be a “guide on the side” and not a “sage on the stage.”
Facilitators are not technical consultants or teachers; they are conductors (without set scripts). They are not the lead decision makers, and are guides rather than bosses.
- Facilitators know the structure and process of the meeting in advance, choosing the right tools and exercises to prevent people's time from being wasted.
They keep the group focused, stay on time, ensure that the group abides by its rules. They make sure the issue at hand and tasks for the meeting are clearly defined and they don't let conversations veer too far off track.
- Successful facilitators remain neutral.
They should leave their opinions and egos at the door, putting the focus on the group rather than themselves.
- Successful facilitators need good listening skills, an open mind, and patience.
They listen to what people say, observe body language, and make adjustments to the agenda as needed to reflect the needs of the people in the room.
- Successful facilitators ask questions; they don't give answers.
They make sure that everyone has a chance to participate and be heard, draw out the shy people, and gently constrain people from dominating the conversation.

Building on Ferrera's point that facilitators ask questions rather than give answers, here are some great questions that can elicit deeper reflections from meeting participants (from [350.org's facilitation tips](#)):

- Can you give me an example of that?
 - Can you say more about that?
 - How did you get to that conclusion?
 - How do you see that relating to [whatever topic you're covering]?
 - What do you think a solution to that could be?
 - Have you experienced something like that before? What was it?
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Skilled Facilitators in Amplifier network

There are also many skilled facilitators in the Amplifier network. (Many of them have been trained at length by ChangeCraft, an organization we highly recommend.) Here are some of their favorite tips.

Will Schneider, Slingshot

Sharna Goldseker (of 2164.net) once told me that only part of facilitation happens in the room, and that a lot of it is about pre- and post-meeting connections with the members. Facilitators need to devote more time than it appears to the meetings in terms of preparation and follow-up, including connecting with members one-on-one by email or phone to make sure their interests are reflected in the meeting and to get their feedback afterwards.

We also do a lot on the principle of shared vulnerability. Before we can have a real conversation, someone needs to say something revealing and personal, to make it okay for

everyone. That person is often the facilitator – just make sure to keep it brief and don't over-share. Model how you want participants to engage in the conversation.

I also like to do at least part of every meeting in sub-groups in the room – breaking people down into partners, or small groups of 3-4, and then having the sub-groups report back to the full group. It ensures that everyone has a chance to be heard, even if they don't like to participate in the full-group conversations or the group is too large to include all voices.

Stefanie Zelkind, Jewish Teen Funders Network

For taking a quick survey of the room, try tools like hands up/hands down votes; or thumbs-up, thumbs-down, thumbs-sideways; or five fingers (hold up 5 for fully agree, 1 for totally disagree, and closed first for neutral).

Think beyond the content to the atmospheric details – should the room be formal or cozy? Full dinner or snacks? Music playing in the background? Toys for the middle of the table to keep all pieces of people's brains engaged.

Always have an agenda, even if it's a casual meeting, so that everyone knows what to expect. Always, always start and end on time. If people can stay later to keep talking, great – but make sure you cover the content of the meeting by the end time of the meeting.

Always have a note-taker. It helps to capture conversations and to record the decisions you're making. Especially when you're making a lot of decisions at once (such as about grants), you really need someone whose job it is to keep a written record.

Felicia Herman, The Natan Fund

So much of facilitation is about listening and aggregating opinions - "I think I hear the group moving this way - yes?" or "There doesn't seem to be a lot of conviction on this idea - can we move on to another one?" Often the group knows what it wants but people will keep batting around ideas, fleshing out all sides of an issue, until they're encouraged to move onto a decision. The facilitator needs to keep an eye on the clock, be aware of the mood of the room (are people getting restless? annoyed? punchy? distracted?), and make sure all voices that want to be heard are heard.

Deciding when to speak and when not to is also an incredibly important piece of a facilitator's skillset. A trusted facilitator has tremendous "social capital" - which means the ability to sway a conversation one way or the

other with just a few words. Be mindful of this power, and use it sparingly. Remember also that, whether you're paid staff or a volunteer member/leader of a giving circle, your obligation is not to any particular organization or member, but to the group as a whole. Often, this means moving the group to a decision that you yourself wouldn't have made - and that's OK, provided it's what the group wants and there's learning that can come out of it. I often stay that the job of Natan staff in our grant committee meetings is to provide information when asked, correct misinformation and misinterpretations, and to prevent the group from making major strategic mistakes. That's very different from walking in knowing "the answer" and guiding the group to that answer - and having "an" answer is the quickest way to lose the group's trust.