

Center for Renewal and Wholeness in Higher Education
Whole People • Whole Organizations • Whole Communities

PREPARATION FOR TEAM FACILITATION

GUIDELINES

The Facilitation Team

The successful facilitation team conducts renewal and wholeness experiences for their college community. The experiences vary depending upon the interests, resources, needs, and culture of the college, as well as upon the skills and qualities of the facilitation team.

Preparation of a team of facilitators to do the work of professional development in renewal and wholeness is an extended, interactive procedure. It is designed to insure that both the prepared facilitators and their mentors in the Center for Renewal and Wholeness in Higher Education (CRWHE) are confident that the events offered in their college communities are consistent with the vision, mission, and values of CRWHE and the gifts of the facilitation team. To reach that level of confidence, CRWHE asks participating institutions to expect the process to take a minimum of two years of active work with new team members.



The facilitation team works closely and effectively with one another—and with their CRWHE mentor—in designing, conducting, and evaluating the college’s plan. All facilitation team members need to be thoroughly grounded in the principles and practices of this work to be able to meet the varied responsibilities of the team. Each member of the team will:

- engage in facilitator preparation retreats and activities;
- deepen understanding of the principles and practices through study, dialogue, and an on-going relationship with a CRWHE-designated mentor;
- attend the Annual Gathering of facilitation teams;
- commit to deepening their own on-going inner work; and,
- identify their own needs, goals, strengths, and weaknesses, and work with the mentor to discern progress toward mutually agreed-upon goals.

In addition, facilitation team members carry out the responsibilities of the particular role that each one fulfills for the team. Our experience suggests that the following are essential:

- **Facilitators.** Facilitators are "circle conveners" who design and lead retreats and other experiences. The facilitator typically carries out these responsibilities:
 - create and hold a disciplined, evocative, and nurturing space for growth and learning;
 - design experiences of different durations for a variety of purposes and participants;
 - use poetry, stories, art, music, movement, and insights from wisdom traditions to evoke the “inner teacher,”
 - understand and employ the power of paradox while holding a trustworthy space,

- invite participation in retreats and other experiences through written and oral communications that are open, comprehensive, and inclusive,
 - articulate the nature and scope of the work clearly and accurately in both oral and written communications, and
 - integrate deep listening, silence, solitude, community, and the Clearness Committee process into retreats and other experiences.
- **Logistics designers.** The designer provides support for a successful program. The logistics designer typically carries out these responsibilities:
 - identify and contract with facilities that provide physical spaces conducive to contemplative experiences, including the opportunity for participants to interact with nature and engage in solitary reflection;
 - produce graphic and written materials about the nature and scope of professional development in renewal and wholeness which describe the college's programs;
 - communicate effectively with college staff about the work;
 - coordinate registration for renewal and wholeness activities; and,
 - acquire supplies and equipment and produce materials needed for retreats and other activities.
 - **Internal champions.** The champion serves as an advocate for renewal and wholeness with the administrative, budgetary, and strategic planning processes in the organization. The champion typically carries out these responsibilities:
 - secure administrative backing for the program;
 - provide budget support and oversight;
 - develop, with the other team members, an overall plan that offers individual renewal and enhances the college culture; and,
 - advocate for the work throughout the college community.
 - **Other roles and responsibilities.** Roles evolve to meet needs on the campus. Often "sages" emerge: people of wisdom who, though prepared as facilitators, do not choose to lead circles themselves but are invaluable as sounding boards and idea generators both for the institutional plan and for retreat planners. Another role that develops with time is "council member," advocates and those with experience in retreats who constitute a diverse and representative group that can guide the team in developing, achieving, and refining the institutional plan as well as in interpreting the work to their colleagues. "Ambience coordinators" may actually be essential in making cost-effective but bleak retreat facilities hospitable.

Starting and Growing the Facilitation Team

Developing and sustaining a successful program requires commitment on the part of those involved—commitment of spirit as well as of time and energy. Those who are considering becoming involved in the work will want to be clear about their ability to dedicate themselves to it. It may be that a restructuring of job responsibilities and work assignments is required.

The following qualities are essential in facilitation team members.

- A strong sense of identity and integrity, both personal and professional.
- Well respected by colleagues.



- Ability to work collaboratively with other team members and a mentor.
- An inclusive, hospitable spirit and ability to interact comfortably with diverse groups.
- A demonstrated commitment to inner work, contemplative practice, and renewal.

Some colleges build their facilitation team over time, supporting the application of one or two people initially and then adding more team members in subsequent years. *Those considering starting a college team are encouraged to consult with CRWHE about this process.*

Teams are urged to consider thoughtfully the skills and qualities needed for successful facilitation before extending institutional support to new members. Not everyone who wants to join the team would make a useful contribution. Sometimes it seems expedient to use co-facilitators who have not been admitted formally to CRWHE's preparation process. Informally adding a new team member without benefit of formal preparation complicates the work of the mentor—and existing team members—considerably. *Please discuss the addition of any team members with your mentor before adding new people to your team.*

Individuals within colleges, but without current institutional support, and those not currently affiliated with a college may want to become facilitators or facilitation team members. CRWHE staff invites individuals to discuss their interest and plans with a staff member to determine the resources available to them and the appropriateness of their application for preparation.

Team Facilitation Preparation

"Preparation" is a term we choose for the process of becoming ready to assume one or more of the roles of team members. We avoid the mechanical-sounding term "training," because preparation is a subtle process requiring ongoing discernment about role, readiness, and effectiveness. CRWHE uses a multiphased approach to preparation.

Phase 1: Application and Acceptance to Preparation. The path this phase takes depends on whether a college is just beginning to develop its facilitation team or is adding new members to an existing team. Ordinarily, individuals interested in facilitation will be identified by a college or university following their team visit and experiences at Richland College. Those who receive institutional support to start or expand a team will complete the application materials (see below). CRWHE staff will offer guidance in the completion of the application materials. They should be submitted to CRWHE by the April deadline each spring.

Phase 2: Team Facilitation Preparation Retreat. CRWHE sponsors one weeklong retreat annually to begin the preparation of new team members—and, increasingly, to sustain the work of those already engaged in facilitation. Historically the retreat has been held in Taos, NM the week before Memorial Day in May, lasting from Sunday afternoon through Saturday lunch. During that week, team members participate as individuals in a renewal and wholeness retreat and begin to consider with the mentor what gifts they bring and role(s) they will have on their team.

Phase 3: Plan and Team Development. Between June and early October, team members who have been to Taos engage individually in reflection and study, while working with their mentor and local advocates and team members to begin developing a professional development plan for renewal and wholeness experiences at the college. They may also begin practicing the development of "third things," getting suggestions and feedback from fellow team members. It is NOT expected that the team will begin delivering renewal and wholeness programs at the college in this phase. Late in the summer, the team may come together with their mentor electronically in a virtual meeting to share the fruits of individual work over the summer and beginning inclinations as to their roles.

Phase 3 concludes with the return of those who came to Taos in the current year (plus as many other team members from previous years as feasible) to the Annual Gathering of CRWHE held in Dallas/Fort Worth early in October. The Annual Gathering offers a retreat experience as well as

the opportunity to deepen and sustain team members' understanding of and commitment to the work.

Phase 4: Mentored Implementation of Renewal and Wholeness Experiences. During this phase, the mentor's work supports the personal work of those who are preparing to be "circle conveners" and the development of the college plan. The mentor will be in frequent phone and email conversation with the circle conveners as they begin to develop plans for activities: book circles, sampler retreats, retreat series, etc.

During Mentored Implementation, the mentor will co-facilitate with the facilitators-in-preparation in planning, delivering, and evaluating experiences in which participants are invited to do their inner work in community. This phase will last as long as needed by mutual agreement, and it will certainly include the mentor's physical presence at the first event or retreat and at the first retreat during which a Clearness Committee is offered.

Phase 5: Growth and Elaboration of Renewal and Wholeness at the College. After the initial retreats described above, the mentor may choose to work mostly by email and telephone. As new circle conveners begin their work, the team mentor will return to oversee and support their work, and the mentor will visit with the Planning Team at least annually to evaluate growth of the movement on the campus.

Timeframe: The work of renewal and wholeness cannot be hurried—for an individual, a team, or a college. Thus, the time for a college to move to Phase I and apply for team facilitation preparation may be several months or even an academic year. Phase 2 takes place in a week, and it is only the beginning of facilitation preparation. Phase 3, the development phase, begins during the four months between the Taos introductory retreat and the Annual Gathering. At that point a draft institutional plan and tentative role discernment will be shared with the team mentor. It may be that implementation, Phase 4, can begin in the spring semester, but colleges often choose to use the spring as additional time for planning and development of circle convening expertise. Often, teams stay in the initial implementation phase for two or more years, as institutional resources are gathered and confidence grows among team members. The growth and elaboration phase is truly a rich one, with colleges deepening their work and supporting the preparation of new team members in a sustainable, organic way. For institutions that are used to being "early adopters" with long lists of "success initiatives," the minimum of eight or nine months of generation that this process initially requires may seem insufferable. For colleges that take pride in their unalterable stability and ageless tradition, that time may appear unseemly in its haste. Whether it is viewed as fast or slow in its development, the impact of engaging college staff in the life-changing work of renewal and wholeness is of serious significance to the college and its students, faculty, and staff.

FOR THE DATES AND COSTS OF TEAM FACILITATION PREPARATION, PLEASE REFER TO OUR WEB SITE:
www.richlandcollege.edu/crwhe.

Application for Participation in Facilitation Preparation Retreats

**FOR THE DATES AND COSTS OF TEAM FACILITATION PREPARATION, PLEASE REFER TO OUR WEB SITE:
www.richlandcollege.edu/crwhe.**

Please prepare an application packet that contains the following items:

- Participant information
- Personal statement
- Statement from your college's Chief Executive Officer or designated administrator

Participant Information

Please provide us with the following:

- Name
- Title, Department, Institution
- Address, City, State/Province, Zip/Postal Code, Country
- Telephone Numbers (work and home or cell, including area codes)
- Fax Number
- E-mail Address(es) (work and home, if applicable)
- Dietary Preferences/Restrictions (Note: Most dietary preferences can be accommodated; please contact us if you have unusual dietary requirements.)
- Special Services Needed and/or Medical Concerns (For example, we'd like to know if mobility issues make it desirable for you to have a ground floor room.)

Personal Statement

Please provide us with a personal statement in which you:

- Describe the relationship of renewal and wholeness to your current sense of vocation. The statement should also indicate how you work with questions of integrity and authenticity in your own life.
- Indicate the role you will play in your college's facilitation team. Those intending to become facilitators should include a summary of experiences with group facilitation.
- Describe your experience with this work (e.g., prior participation in retreats, professional development experiences, book discussion groups, etc.) or other inner work or contemplative experiences.

CEO Statement

Your application packet will include a statement from your college's Chief Executive Officer (or designated administrator) indicating:

- The institution's level of commitment to the goals of professional development in renewal and wholeness
- Support for the costs associated with preparing and sustaining facilitators and team members (primarily travel costs and participant fees for preparation retreats and the Annual Gathering, and mentoring fees and expenses)

Additional Information from Teams

One member of the college's team should also include a statement indicating:

- The current state of professional development in renewal and wholeness at your institution
- Any known issues and plans for your institution

Please send your completed application materials:

- Electronically to crwhe@dccd.edu, or
- By mail to:
The Center for Renewal and Wholeness in Higher Education
Richland College
12800 Abrams Road
Dallas, TX 75243