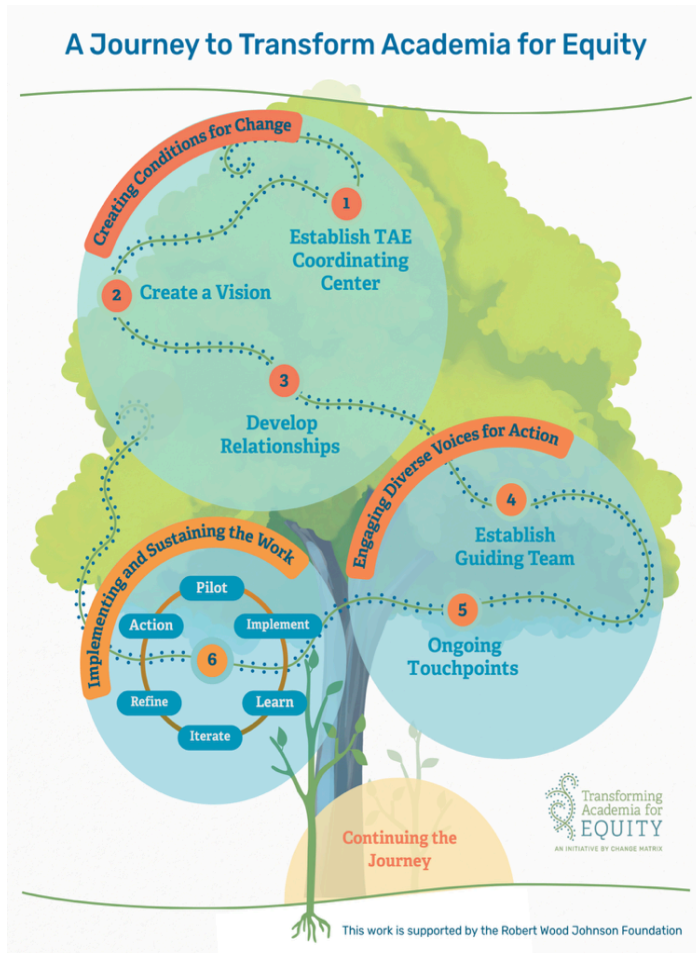




# Facilitation Activities Guide

A Resource for Inclusive Work Environments



**Figure 1. The Leading Through Change Framework developed by Change Matrix and used to support the work of TAE grantees.**

## About

*“The facilitator’s job is to support everyone to do their best thinking. To do this, the facilitator encourages full participation, promotes mutual understanding, and cultivates shared responsibility.” – Sam Kaner*

Building a culture and climate that engages diversity within an inclusive learning and work environment to collectively drive toward equity, where all participants perform at their best, feel supported, and grow their work in health equity, is a complex challenge.

Facilitation is a critical skill when undertaking complex, iterative change.

Facilitators play a key role in engaging diverse voices, keeping an eye on the level of distress in a group, and helping them navigate through the work with compassion and care.

Facilitation is an essential component of Transforming Academia for Equity (TAE)<sup>1</sup> Coordinating Center as implemented by Change Matrix. This guide describes facilitation methods that Change Matrix has used across several convenings with TAE grantees and project partners.

<sup>1</sup> TAE is an initiative funded by the Robert Wood Johnson Foundation to support seven grantees from schools and programs of public health to unpack, understand, and shape the contextual and intervening conditions necessary for underrepresented scholars to thrive professionally and personally—and in turn, be better able to contribute to and expand health equity-related research and evidence that can help build a Culture of Health.

These methods support collaborative learning, reflection, strategic planning, and peer exchange among participants working to advance equity within schools and programs of public health.

Change Matrix used its *Leading Through Change Framework (LTCF)* (**Figure 1**) to support each grantee institution's unique TAE journey in undertaking a change process. The activities described in this guide have been organized based on the three main phases of TAE work:

creating conditions for change, engaging diverse voices for action, and implementing and sustaining the work.

This guide is a resource for anyone leading change in the public health field to create inclusive space for all participants. Facilitators should choose strategies from this guide based on the group's current developmental stage and the purpose of their work.

# Activities to Create Conditions for Change

## Community Builders

Building a community starts with individuals. Community builders, used at the beginning of sessions, invite people to share about themselves to create connection, build trust, and help people transition into shared learning. These activities also help participants connect personally with each other and in the work.

### When to Use This Activity

Community builders work well when:

- Participants are meeting for the first time
- The group includes multiple organizations or institutions
- Participants will be discussing complex or sensitive topics
- You want to emphasize community and shared purpose (which is most of the time)

They are particularly useful at the start of multi-day convenings or new learning cohorts and can help participants reflect on their experiences and establish relational grounding for deeper dialogue.

### How to Facilitate

1. Introduce the community builder prompt and provide brief context.
2. As the facilitator, offer your own response first as an example.
3. Ask participants to reflect individually for a few minutes.
4. Invite participants to share as part of a full group or in small groups of 3-5 people.
5. Ask each participant to share a response.
6. Close with a brief whole group summary or reflection.

Example prompts:

- What are you calling the work you are doing?
- What song represents your team's transformation journey?
- What do you bring to this work?
- What is the last thing you learned from someone on your team about the work?

## Celebrity Interviews

This [Liberating Structures](#)<sup>2</sup> activity invites peers to explore their experiences and the challenges of advancing work through structured storytelling and listening. Celebrity, or what we call peer interviews, can be used to get to know one specific person. It can be helpful for facilitators to model the interview process before participants conduct interviews with each other, often in groups of 2-3 people.

### When to Use This Activity

This activity is most effective when the goal is to:

- Surface lived experiences
- Learn about the personal vision of an individual
- Explore challenges in the work
- Build trust and empathy within a group
- Encourage reflective listening

### How to Facilitate

1. Conduct/model a short interview with a volunteer or co-facilitator.
2. Divide participants into groups of two to three.
3. Assign roles, such as interviewer, interviewee, and observer.
4. Rotate roles after each round.
5. Conduct a whole group reflection on themes that emerge.

## Storyboarding

Sometimes, developing a vision in a creative, less verbal way is both useful and leverages a team's collective creativity. Storyboarding is a visual reflection exercise that helps teams articulate their journey, progress, and future direction. It can also help teams communicate about their successes and lessons learned.

### When to Use This Activity

Storyboarding works well when:

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<sup>2</sup> Lipmanowicz, H. & McCandless, K. (2014). *The Surprising Power of Liberating Structures: Simple Rules to Unleash A Culture of Innovation*. Seattle: Liberating Structures Press.

- Teams are forming and building a shared vision
- Teams are reflecting on a project journey
- There is a need to synthesize complex work
- Groups are preparing to communicate their work to others
- There is a desire to combine creative and analytical reflection

### **How to Facilitate**

1. Provide participants with supplies (poster paper, markers, sticky notes).
2. Provide prompts such as:
  - What is your vision? What will the future look like?
  - What progress has been made?
  - What challenges remain?
3. Provide time and materials to create their storyboard.
4. Invite teams to present their storyboard to the group.
5. Facilitate discussion about themes, similarities, and differences.

# Activities to Engage Diverse Voices for Action

## 1-2-4-All Reflection Dialogue Model

This activity, also from [Liberating Structures](#), encourages thoughtful reflection and participation, prevents early dominance of discussion by one person or set of ideas, supports deep reflection before group dialogue, and helps participants explore complex ideas by moving from individual reflection to progressively larger group dialogue. It is particularly useful when participants need time to examine their own beliefs or ideas before engaging in collective discussion.

### When to Use This Activity

Use the 1-2-4-All model when:

- Participants need time to reflect on challenging or abstract ideas on their own and in small settings
- You want to ensure all voices are included
- The topic involves values, beliefs, or interpretations
- You want to generate rich discussion in smaller, more intimate settings before moving to large-group dialogue

### How to Facilitate

#### Step 1: Individual Reflection (1)

Participants reflect individually on a prompt or assertion and take time to write down their responses.

Sample prompts:

- What does equity look like in this setting?
- What distinguishes a leader from leadership in this work?
- What assumptions are informing your ideas about action?
- What could happen to ensure diverse voices are included?

Participants write notes or reflections for several minutes.

#### Step 2: Pair Dialogue (2)

Participants pair up and discuss their reflections and responses.

Facilitator guidance:

- Ask participants to note commonalities and differences.
- Encourage curiosity rather than debate. For example, provide direction to just listen and ask questions while avoiding direct responses during this phase of the exercise.
- Invite participants to identify themes.

### Step 3: Small Group Dialogue (4)

Pairs join another pair to form groups of four. Share the themes from the dyads.

In groups of four, participants:

- Compare insights
- Discuss implications for practice
- Identify ideas that should be shared with the larger group

### Step 4: Whole Group Reflection (All)

Groups share insights and implications with the full group.

Facilitator role:

- Capture and condense themes.
- Highlight tensions or emerging patterns.
- Link reflections back to practice or topic.

## **Scenario Skits and Interactive Role Play**

Learning happens best when there is an opportunity to experience interactions and feelings while exploring innovative ways to communicate and move the work forward. Role-play activities, like [Theatre of the Oppressed](#)<sup>3</sup>, allow participants to explore challenges through experiential learning. Participants create and perform short scenarios that illustrate challenges such as power dynamics, resistance to change, and trust-building. Audience members may interrupt the skits and suggest alternative responses or strategies. They may even ask to take the place of one of the participants to explore an alternative strategy.

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<sup>3</sup> Boal, Augusto. *Theatre of the Oppressed*, Theatre Communications Group, 2013. *ProQuest Ebook Central*, <https://ebookcentral-proquest-com.yale.idm.oclc.org/lib/yale-ebooks/detail.action?docID=1394257>.

## **When to Use This Activity**

Role play is useful when exploring:

- Conflict situations, especially entrenched and embedded conflicts that are hard to surface and address
- Leadership dilemmas
- Organizational power dynamics
- Difficult conversations
- Complex change that includes multiple, diverse perspectives

## **How to Facilitate**

1. Introduce the challenge.
2. Divide participants into small groups.
3. Ask groups to create a short scenario.
4. Have groups perform their scenarios.
5. Invite the audience to pause the scene and propose or participate in alternative actions.

# Activities to Implement and Sustain the Work

## 15% Solutions

Sometimes a change initiative feels so overwhelming that it can keep a group from taking action. This [Liberating Structures](#) activity, 15% Solutions, helps participants identify small, immediately actionable steps they can take to move a challenge forward using the resources, authority, and relationships they currently have in place. Rather than focusing on barriers or waiting for large structural changes, this method encourages participants to recognize the portion of influence they control—often described as their “15%.” This activity promotes a sense of agency and forward momentum by helping participants identify concrete actions they can take right away to advance their work. In leadership and equity contexts, it supports participants in translating reflection into practical steps.

### When to Use This Activity

Use the 15% Solutions activity when:

- Participants feel stuck or constrained by systemic barriers, or the change they seek is complex
- The group needs to shift from discussion to action
- The goal is to encourage individual leadership, initiative, and/or creative thinking

### How to Facilitate

#### Step 1: Introduce the Concept

Set the expectation that the group is not addressing the entire challenge and is taking a more iterative approach. That is progress. Explain that a *15% solution* refers to actions participants can take without additional resources, authority, or permission. Encourage participants to think about actions that are practical, immediate, and within their influence.

Example framing:

“Even when systems feel rigid, each of us typically has some degree of freedom to act. The question is: *What is the 15% within your control that could help move this work forward?*”

### Step 2: Individual Reflection

Ask participants to reflect individually for several minutes and write down their 15% solution.

Example prompts:

- What is one small action you could take to advance this work?
- What is within your control right now?
- What step could you take in the next week or month?

### Step 3: Pair or Small Group Exchange

Participants share their ideas with a partner or small group.

Encourage participants to:

- Ask clarifying questions
- Offer suggestions or refinements
- Identify potential collaborators or resources
- Focus on making ideas more concrete and actionable

### Step 4: Whole Group Reflection

Invite participants to share examples of their 15% solutions with the larger group.

Facilitators may ask:

- What patterns are emerging across the ideas?
- What actions feel most energizing or achievable?
- What support might help participants implement their ideas?

## Crowd Sourcing Ideas

Before a group decides on an activity to implement, it is often useful to generate multiple, creative, innovative ideas. Crowd Sourcing is a quick [Liberating Structures](#) activity designed for a group to rapidly generate, share, and prioritize ideas. Participants write one idea on an index card related to a shared challenge or desired outcome and then move around the room exchanging ideas with others. Through several short rounds of conversation, participants briefly discuss each idea and assign a score based on their individual assessment of its potential impact.

Because each idea is reviewed and discussed by multiple participants, the group's collective judgment is leveraged to identify the most promising ideas. This method helps surface innovative thinking, encourages participation from everyone, and prevents the group from early focus on a single perspective.

This activity can be used on its own to generate and prioritize ideas or paired with activities such as 15% Solutions (see above) to help participants identify practical actions that can move the highest-rated ideas forward.

### When to Use This Activity

Use Crowd Sourcing to:

- Generate many ideas quickly based on creativity and imagination.
- Identify promising or innovative solutions.
- Broaden participation in evaluating ideas.
- Surface priorities from the group.

### How to Facilitate

#### Step 1: Introduce the Prompt

Present a challenge or question and ask participants to write one idea on a card or sticky note.

Example prompts:

- What bold idea could accelerate equity in your organization?
- What innovation could strengthen collaboration across teams?
- What action could significantly advance this work over the next year?
- What action could best meet this current challenge?

### Step 2: Share and Score Ideas

- Participants stand up, move around, and trade cards without looking at them. (Feel free to use music to start and stop the movement). And then when time is called, pair with someone nearby.
- Each participant briefly shares the idea on the card they ended up with and engages in a brief conversation about why.
- After both ideas are shared, each person scores the idea on the card they are holding from 1 to 5 based on its potential impact.

### Step 3: Continue the Rounds

- Participants repeat the process, trading cards and partnering with new partners. For each round, they share and score the idea on the card they are holding.
- Continue for up to five rounds so that each idea is discussed and scored by multiple participants.

### Step 4: Identify Top Ideas

- At the end of the rounds, participants total the scores on the card they are holding.
- Start with the highest possible number (25 in the case of 5 rounds with a scoring of 1-5). If no idea scores 25, proceed to ask for scores in descending order. As ideas are identified as high scoring, ask participants to read them aloud to the group.
- When the top 3-5 ideas are named, ask the group to identify how they will proceed to implement them.

## **Journey Mapping**

It is important for individuals working on an initiative to remember the steps they have taken in their journey and the challenges and wins along the way. This provides momentum to continue.

It is also important to engage others in their work to provide history, context, and a sense of future direction. Journey mapping allows participants to visually document the evolution of a project, initiative, or collaboration. Participants identify key milestones, challenges, and turning points. This activity helps participants document the story of their work and prepare to share it with others.

### **When to Use This Activity**

Journey mapping works well when:

- Reflecting on multi-year initiatives
- Preparing for storytelling or dissemination
- Evaluating progress and identifying future directions
- Facilitating strategic reflection

### **How to Facilitate**

1. Provide a timeline or mapping template (see example in Appendix A).
2. Ask participants to identify key moments in their journey.
3. Encourage reflection on successes, challenges, and lessons learned.
4. Invite teams to discuss how their journey informs future work.

# Appendix A

## Sample Template: TAE Journey Mapping Guiding Questions

GRANTEE JOURNEY POINTS	GUIDING QUESTIONS
Starting Point ("Where You Began")	<ul style="list-style-type: none"> <li>• <b>Main Question:</b> Thinking back to when your organization first started this grant journey (late 2021):</li> <li>• <b>Sub Questions:</b> <ul style="list-style-type: none"> <li>○ How would you describe your starting point? <b>Prompts:</b> origin story, timeframe for starting point</li> <li>○ What were your initial goals and expectations in terms of transforming academia for equity? <b>Prompts:</b> What excited you about this opportunity, what process did you follow to decide pursuing this opportunity, outlining your goals.</li> </ul> </li> <li>• <b>Scenic Views:</b> Please describe the element(s) that went well for you during this starting journey point? <b>Prompts:</b> <ul style="list-style-type: none"> <li>○ Can you describe any memorable moments or achievements during this time that you are proud of [e.g., positive feedback from participants or partners (guiding team, leadership, faculty, students)]?</li> <li>○ What/who were the facilitators/contributors to these scenic views?</li> </ul> </li> <li>• <b>Roadblocks &amp; Detours:</b> What were some of the initial setbacks and lessons learned that you experienced during this journey point? <b>Prompts:</b> How did you adjust or change directions upon experiencing initial setbacks?.</li> </ul>
GRANTEE JOURNEY POINTS	GUIDING QUESTIONS
Milestones Along the Way ("What You Experienced")	<ul style="list-style-type: none"> <li>• <b>Main Question:</b> Thinking back to your starting point (late 2021) and now (early 2025), please identify the key milestone(s)/turning point(s) that have shaped your journey thus far.</li> <li>• <b>Sub Questions:</b> For each milestone/turning point that you identified, please describe: <ul style="list-style-type: none"> <li>○ <b>Scenic views:</b> Please describe the element(s) that went well for you during this starting journey point?</li> <li>○ <b>Roadblocks and Detours:</b> What were some of the setbacks and lessons learned that you experienced during this milestone in your journey that helped you move forward?</li> </ul> </li> </ul>
GRANTEE JOURNEY POINTS	GUIDING QUESTIONS
Destination ("Final Outcomes")	<ul style="list-style-type: none"> <li>• <b>Main Question:</b> Thinking back to the starting journey point we talked about earlier:</li> <li>• <b>Sub Question:</b> How would you describe this current destination, i.e. where you are now?</li> <li>• <b>Sub Question:</b> Did you reach your initial goals and expectations? How do the outcome(s) compare to the goals/expectations at the start?</li> <li>• <b>Scenic Views:</b> Please describe the element(s) that are going well for you at this destination? <ul style="list-style-type: none"> <li>• <b>Prompts:</b> <ul style="list-style-type: none"> <li>• Can you describe any memorable moments or achievements during this time that you are proud of [e.g., positive feedback from participants or partners (guiding team, leadership, faculty, students)]?</li> <li>• What/who were the facilitators/contributors to these scenic views?</li> </ul> </li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Roadblocks &amp; Detours:</b> What were some of the takeaways/lessons learned that you experienced as you arrived at the destination (now)?</li> <li>• <b>Prompts:</b> What challenges did you face and how did you work to overcome them?</li> </ul>
New Emerging Journeys ("Moving Forward")	<ul style="list-style-type: none"> <li>• <b>Main Question:</b> As you think about the journey you have been on since late 2021 and as you think about where do you go from where you are now, what are some of the new emerging destination/s that come to mind?</li> <li>• <b>Sub Question:</b> What goals/expectations do you have in mind as you think about the future in terms of transforming academia for equity?</li> </ul>