A Guide to Planning and Facilitating Dialogues  
Office of Community Engagement

This guide is aimed at preparing facilitators for dialogues associated with projects related or sponsored by the Office of Community Engagement. Some examples include intergenerational dialogues that will be held as part of a course project, the Soup and Substance series, or community dialogues organized by students and community partners collaboratively to raise awareness of issues of interest to them. Because every dialogue or discussion is different, this guide is quite general; however, if you choose to request a training from our office, you will have an opportunity to begin to plan your dialogue, and to determine how these general guidelines relate to the event you are planning.

Clarity of Purpose

Why do you want to have a discussion? What outcomes are you hoping to reach through dialogue? You will want to be clear on the answer to this question from the beginning; this will help you determine the format to use for your discussion or dialogue.

Good Dialogue: Some Values

* Inclusivity: Facilitators should ensure that all people interested in the topic or purpose of the dialogue should be invited—not passively, but actively.

* Flexibility: Facilitators should be open to the emergence of new ideas or directions for the dialogue, while also ensuring that everyone involved agrees to take a dialogue in a new direction.

* Equity: Facilitators should strive to create a space in which all voices are equally valued.

* Assessment: The success of the dialogue should be assessed by all those who participated, and next steps (or follow-up dialogues) should be reported in some way to all those who were in attendance.

Determining a Format

Your format will depend on two things: 1) your purpose and 2) the constraints of your dialogue (time limit, whether or not it is part of a class project, etc). Some types of dialogues or discussions are as follows:

Learning Circle: The purpose of a learning circle is to inspire activists to remember why they are doing the work they do and to plan next steps in their activist work in a safe and affirming environment. In this type of dialogue, participants are encouraged to share personal connections to a concept or idea. For instance, if the topic is oppression, those in the circle will share times they have felt oppressed or been part of an effort to oppress others. Through the telling of stories, themes emerge, and the group makes plans for next steps, either personally or collectively. The facilitator sets ground rules and asks a broad question, then ensures that each participant simply tells a story related to the question without commenting on another person’s story. Afterwards,
the facilitator asks follow-up questions that draw on the themes that have already been discussed, until the group is beginning to make personal or collective commitments to the next steps they will take in their activist work. Learning circles can be one-time events or a series of discussions, usually held in a short period of time (such as on a retreat).

**Study Circle:** The purpose of a study circle is to directly address a community problem using written and visual tools that help to contextualize that community problem. In this type of dialogue, the group is responding to a specific text or prompt that relates to the problem, chosen by the facilitator, which the participants have read/viewed/considered ahead of time. The purpose of the study circle is to deepen an understanding of the text or prompt and its relation to the community problem. Study circles usually involve 5-6 discussions, and end in a clear action plan. The facilitator’s role is to prepare and distribute materials ahead of time and come with prepared discussion questions, then ensure the conversation stays on topic.

**Panel Discussion:** This type of discussion is meant to raise awareness of a topic through a group of chosen speakers who prepare to talk about their personal or professional connection to the topic. Panelists might respond to a specific movie or event that they watch with participants, or they may be asked to come prepared to talk about a topic in the news, a community challenge, etc. Those who attend listen to all the panelists comment on the topic. The facilitator’s role is to then draw out themes among the speakers and call on participants to ask the panelists questions.

**Inviting Participants**

Learning and study circles must include people with an investment in the topic; they might be members of a particular group that is working on a particular issue or might be invited by passive means (posters, etc), self-selecting their participation. For panel discussions, it will be important to choose a range of panelists with different types of expertise in the topic which will be discussed. In some cases, if your event is associated with a class or an already existing series, you will have a “ready-made” group of participants. If this is the case, be sure to learn as much about them as possible, and to tailor the dialogue to them.

**Introducing the Discussion and Format**

It is your job as facilitator to set the tone by introducing yourself and explaining the purpose and format of the discussion. For example: “We are gathered together to learn about how the housing crisis affects our community. We’re going to do that using a format called a study circle. Study circles begin by discussing a prompt, in this case, the articles we read prior to our meeting, and then exploring how the prompt relates to our local community problem. Then, we will consider what other information we need to gather before we make a plan of action. We hope to accomplish this through six two-hour meetings over the next two months.”

**Setting Ground Rules**

The type of dialogue you are facilitating will determine the ground rules to some extent, though in all cases, respect is the premise.
For panel discussions, share ground rules before the discussion. Be sure panelists know how much time they have to speak and what they will be covering. Before the discussion begins, be sure attendees also understand their role, when they will be given an opportunity to either comment or ask questions, and what kinds of comments or questions are off limits. Frequently remind people in attendance of time limits.

For study circles, ground rules should be generated as a group in the first session. They should include some ideas for what people should do if they feel they are not being respected, and what constitutes respectful dialogue. Whether or not to maintain confidentiality also merits some discussion. Because study circles are meant to lead to plans of action that directly address community problems, in some cases, confidentiality could make following through on a plan difficult; on the other hand, some types of information shared might need to remain confidential in order to maintain respect and safety. These issues should be discussed as a group if there is time.

Learning circles have some ground rules that are a part of the format. Confidentiality is important to encouraging the sharing of personal stories. Unlike panel discussions and study circles, learning circle do not involve direct responses to other participants about what they have said, whereas other formats encourage such responses. It’s important to be clear on the purpose and parameters of the discussion.

If participants are expected to attend multiple meetings, or to come prepared by having read or studied something, be sure this is clear when you are setting ground rules.

**A Note about Team Building, Event Planning, and Public Relations**

The event planning training offered by our office overlaps with this training, because most dialogues are also, in essence, events. Be sure to ask for and read through the training materials for event planning, which will provide many helpful hints for how to build a planning team, how to deal with logistics, and how to publicize your dialogue or discussion.

**A Note about Inclusivity and Equity**

If you’re serious about being inclusive and equitable, make sure you think about what barriers a potential participant might have, as well as how to include them without insulting them or making them feel out of place. How can you accommodate participants’ disabilities? Their communication styles? Their level of knowledge (or varying level of knowledge)? Some examples:

If you are facilitating a discussion for fourth graders, don’t use adult language to explain the topic or ask questions, and don’t expect the kids to sit still for three hours.

If you want to discuss immigration, and many immigrants in your community speak only or mostly Spanish, a translator should be present.

When choosing a space for your dialogue, consider how comfortable the room will be for people with physical disabilities and people of differing ages and sizes.
Think about your sound system; make sure all the speakers can be heard by anyone (including people with hearing impairments).

People who have been immersed in working with people with developmental disabilities for a long time are going to be irritated if the conversation begins with a question like, “What do you know about developmental disabilities?”

**Asking Questions**

Questions should always be open-ended and clear. For instance, asking panelists to begin with the question “What is your connection to the topic?” might be a good starting place. Study circles might begin with a specific question to ground the readers in the text, as in, “What was the author’s main idea?” followed by “Do you agree with this premise? Why or why not?” Learning circles will begin with “Tell a story of a time when…”.

**Identifying Themes and Follow-Up Questions**

Facilitators listen carefully. They are able to focus on what people are saying, and they pay attention to connections among comments that are made, as well as disconnections. It’s important for follow-up questions to relate to what has happened in the discussion up to that point. Some examples:

From a study circle: “It seems that there is some disagreement within the group about the author’s main argument. Some feel she is saying that feminism is no longer a necessary model for community change, and others feel she’s calling for a new kind of feminism that is more inclusive of men. Let’s see if we can figure out the root of this disagreement. Does someone want to point to a place in the text where they got their idea about the root of her argument?”

From a learning circle: “What themes did you notice in the first round of stories?” And then: “Since one of our themes is about fear of saying the wrong thing, I wonder if we can each tell a story about a time when we chose not to speak for fear of saying the wrong thing, and what we might have lost in that moment.”

From a panel discussion: “Jean and Mary both talked about what it was like to start college without family support. They both noted how little they understood about financial aid and how they didn’t know how to study. Frank and Tim talked about having similar disadvantages because their parents weren’t college graduates themselves. I’m wondering if you all can comment further about how not knowing how to study affected you, and how you were able to overcome that problem. After all, you’re all still in college, so you must have found a way.”

**Closing the Discussion/Next Steps**

Regardless of what kind of discussion you are leading, it’s important to close the discussion with some kind of a summary of what has been said and a list of next steps. Depending on the purpose of this discussion, the summary and next steps will take different forms. Here are some examples:
Panel discussion: “Now that we’ve had a chance to reflect on the roots of oppression of people whose first language is not English and to consider how migration affects us as Morris residents, I am hoping you will take some time to decide whether you want to get involved in this issue, and if so, sign up for a follow-up meeting.”

Learning circle: “We’ve all renewed our commitment to our individual work, but we’ve also come up with some ideas for how to resist oppressive actions collectively. I will send that list of ideas out to the group so we’ll all have them in writing.”

Study circle: “We’ve considered the problem of homelessness in Morris together, and we now have an action plan for what we can do to eliminate at least one of its core causes—a lack of understanding of how personal credit works among some segments of the population. We have an action plan, which I will send out to you in writing. We’ll meet again next week to delegate tasks.”

What if…

*There are no easy answers; discuss these “what ifs” and talk about what you would do in the moment and what might have helped prevent this from happening. Consider how the format of the discussion will affect your answer.*

*A participant dominates discussion, often interrupting or going on for longer than s/he should.*

*A participant does not participate at all.*

*A participant argues with another participant, raising his voice.*

*A participant leaves in the middle of the discussion.*

*A panelist talks about something completely unrelated to what you and she had agreed she would cover.*

*A participant becomes an “expert in everything,” suggesting through her stories or examples that she has more experience or knowledge than anyone else in the room.*

*A participant quotes facts you believe to be untrue.*

*A participant begins to cry while speaking.*

*A participant uses a derogatory word; you are fairly certain he does not know the word is offensive, but you can tell others in the group are upset.*

*A participant seems disengaged and is fidgeting, looking at her watch, and yawning.*
*There is a long silence between comments or after you ask a question, and you feel uncomfortable.