

xchange

Facilitator

Field Guide

2024 | February

The Facilitator Field Guide is your monthly backstage pass to the xchange experience. Uncover member-verified tips, real-world case studies, and community insights that'll have you mastering the art of conscious facilitation while staying in the loop with the latest happenings inside of xchange.



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Three Ways to Apply xchange This Month

Close your next group meeting with a Present question such as: “What do you appreciate most about our time together today?”

✓ [\[read more about Present questions here\]](#)

Practice visually showing and explaining the key steps of your instructions for moving a group into an xchange Choreography.

✓ [\[learn more here\]](#)

Ask: “What is the lesson that you want participants to learn?” or any of these 6 questions during your next client discovery call.

✓ [\[Facilitation Insight\]](#)



MEMBER PRO TIP

“Experiment always! You can try something out and see how it feels for you. Just because it was right for someone else doesn't mean it fits your event/audience perfectly. Try something out and iterate over time!”

— Andrea Carpenter

What to Study This Month

Purpose Questions

A purpose question invites us to connect to a deeper meaning, purpose, or fulfillment, either in general or in relation to the meeting, event, or task at hand. Often we begin our convenings with this type of question before we do anything else. It can set the tone powerfully.

Examples of a Purpose Question

- Why is being here today important? For you? For those whom your work serves? For the world?
- Why are we here?
- Why does this work/project/task/team matter?
- When you reflect on all your experience in our organization/as an entrepreneur/etc, what story stands out more than any other that reminds you why the work that you/we do is so important in the world?

Purpose Question Resources

- Watch Jon introduce you to a purpose question [\[here\]](#)
- Read example purpose questions [\[here\]](#)
- Learn about variations to purpose questions [\[here\]](#)



Important Reminders

1) Join our upcoming Advanced Training:

Design & Facilitation: In-Person Event Playbook

Wednesday, February 21, 12-4pm ET

During this Advanced Training you will learn how to think about, prepare for and design in-person events / gatherings that have the power to unlock potential, transform groups & individuals and create measurable impact for participants.

You'll learn from the playbook we use at xchange to design and lead large scale gatherings, intimate retreats and task-oriented business meetings, all with the common goal of creating a safe space for people to connect, learn and belong.

Having confidence in how to design a powerful agenda and set the physical space will bring value to you, your clients and the event participants. **The skills you'll learn have the ability to help you become a trusted, full-service design & facilitation partner, able to command high fees for the value you can create.**

Some of what you can expect to experience and learn during this Advanced Training:

- The xchange "Unified Space Principle" for physical room setup
- Elements we consider when selecting / setting a physical space
- How to recruit and train "mic-runners" for in room support
- Sharing of key insights from our own transformational, annual community summit - Transformation by Design!
- The "Support" choreography as a powerful way to create connection and support through a real-time peer coaching experience
- Access resources and assets in the Learning Lab to support your designing

[Learn more and RSVP here](#)



MEMBER INSIGHT ON ADVANCED TRAININGS

"It was a short and deep dive into one specific choreography. Love this new training session!"

— Jorge Sciupac

2) #ask - Have you updated your Member profile?

#ASK Is your Member Profile up to date?

MEMBER PROFILE
Jon Hockman
 Facilitation and advisory services for association leaders who want to make their best decisions.
 Community Member - OXE Tri
 United States Earlysville, Virginia [Admin Edit](#)

Jon Hockman's Bio
 The short version: Listens. Learns. Takes good care.
 The long version: I'm a student of human dynamics and a specialist in the business of getting people to talk.
 I've spent my entire career working with non-profits. I'm motivated by mission and inspired by results.
 Next to being a husband, nothing makes me more proud than helping leaders of organizations make their best decisions about big challenges related to strategy, people, and performance.
 I hold a B.A. from The Ohio State University, and did my Master's work at the American University. I used to run a seafood shop too, so I know how to file a fish.
 I'm a former CEO of a college fraternity, which means that at any given point in time I was

#GIVE

- Agenda Design and Thought Partnership
- Co-Facilitating
- Co-Host / In Event Support (Behind the Scenes)
- Event Rehearsal / Runthrough

#ASK

- Agenda Design and Thought Partnership

Industry Experience

- Educational / Academic
- Healthcare
- Industry Association
- Nonprofit

xchangeapproach.com/updateprofile

3) Share your #Debriefs

Keep the learning experience alive by taking time to reflect on your facilitations and sharing your key learnings with our community.

Use the template we have created for you [\[here\]](#) and post your #debrief to our Facebook community!

These provide tremendous support to fellow xchange members by inspiring what is possible and paying forward your wisdom learned.

xchange Community [Members Only]

Rachel Ann
 Top Contributor · December 19, 2023 · 🌐

#Debrief This was a micro-event that was a huge personal win for me AND totally a product of this community **#praise**--from its birth at the community summit (Svetlana Parilova's share about doing a retreat for women at a community yoga studio over dinner planted a seed for more!--and inspired me to create more opportunities for myself to do that--many thanks to Terri Werner, Keith Blackborg, and Jesse Harless for their insight and questions) to moving from idea to action at the December OXE (thanks for their insight and questions) to moving many thanks to Steven Bouchard, and being supported along the way by the amazing ACLA crew. And, practice helped me get unstuck, figure out what I needed (moral support!), and resource myself so I could be who I chose to be.


Client Name: West Side Momfia
Project: Momfia New Year's Mini-Retreat
Description of the Engagement: This was a one-hour retreat I offered up to moms in my neighborhood FB community (because we are in New Jersey, obviously this group is called the Momfia). It was modeled after the 30-day accelerator calls and the New Year's Lunch I hold for our team at work each year. Here's the description: "On this call, we'll do some individual reflection and do some goal/intention setting for 2024. The call will be a combo of dumpster fire!"
Client Type: Moms in my neighborhood
Event Type: Virtual
Impact Level: Community
Duration: 1 hour
Participants: 4
Agenda: Because perfectionism is something I often throw into the OXE fire, I am sharing this not pretty, half-scripted/half-unscripted, full of typos and tons of different fonts/styles agenda.
<https://docs.google.com/.../14tsOyPZVlvMfCSBK2uk22t.../edit>
My Top 2-4 Learnings:
 - Do individual outreach--it pays off! I did minimal outreach to invite people to attend this (I only directly reached out to two people). I probably could have gotten more people to join if I had spent more time doing 1:1 messages and emails. One of the people I reached out to said she had completely missed the Facebook posts about it.

Bringing Values to Life

A 'done for you' templated activity you can pick up and apply!

Use [\[this worksheet\]](#) to bring "Values to Life" in any team, community or organization. This can be a very high energy activity to breathe life into an existing set of core values.

Bringing Values to Life





Think of a real life **STORY** (or example) of when you've seen the **VALUE** of _____ "come to life".


- Perhaps you or someone else in the organization embodied this value in a meaningful way.
- What did you see, hear or feel happen as a result of this value being demonstrated? What might be **important to share** with others here today?


NOTES


INSTRUCTIONS

 **FORM GROUPS:**
When prompted, form **Groups of _____**, ideally with those you don't know or don't know as well.

 **SHARE:**
Each person shares their story, one at a time, in about _____ min(s). total.


 *Repeat for ALL group members*

 **NOMINATE:**
After ALL have shared, nominate **ONE** story to share with the whole group.

 **TIMING:**
About _____ mins. **TOTAL** in small groups.

BONUS!

(After nominated stories are shared...)

 **COMMIT:**
What is a **commitment** you can make, that will continue to bring this value to life moving forward?

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Member #Debrief



Melva Lucas Holt
Mentorship (Level 3) Member
Member since December 2022

Manufacturing Leadership Team Offsite

EVENT DESCRIPTION

This was a full-day session away from the offsite dedicated to team building and aligning on Q4 goals. This team had been in transition for 18 months and this was the first time they took time away from the day-to-day to build trust among the group and determine how they will hit a very challenging target for the last quarter of the year. I used 5I as the design for the day with connection, paired interviews and crowdsourcing choreographies within.

HIGH LEVEL AGENDA

- 8:30 AM - Welcome & Connection Exercise
- Visioning Exercise
- Ideation & Brainstorming Session - How to Create the Vision
- 12:00ish - LUNCH
- Ideation & Brainstorming - continued
- Building the Plan Session
- Action Planning
- Closing
- 4:00 PM - Departure



CLIENT TYPE: Business

EVENT TYPE: In-Person

IMPACT LEVEL: Team

DURATION: 7.5 Hours

PARTICIPANTS: 6 (GM, Director Ops, Director Quality, Director Supply Chain, Director HR, Director Program Management)

TOP LEARNINGS

- In xchange language - plan tight and hang loose. We covered a LOT of territory in our time together.
- Always meet with each executive prior to entering the room. No matter how much you know the organization, it is critical to understand the mindset and expectation of each participant at this level before entering the room. I did NOT do this and had to make some on the fly changes to really spend time in the trust-building phase to allow the alignment discussions to move forward.
- Keep the groups moving and talking. They appreciated the use of post-its and circulating to different topics during our
- Have all offsite meetings at a beachside location!

PARTICIPANT TESTIMONIALS

"The offsite went VERY well."

"We need to do this quarterly."

"It was great having someone guide us through this day to allow us to think bigger."

"I didn't know how these things connected, but I see how you brought us to clarity."

Closing Feeling Words: Thankful, Re-Energized, Aligned, Positive, Reinvigorated



Click to see Melva's full #debrief and share feedback with her in our Facebook group

Learning Opportunities

UPCOMING PRACTICE SESSIONS

Practice Sessions offer the opportunity for live practice in the areas of Designing, Facilitating and Presenting, along with the opportunity to give and receive peer feedback in a structured way.



Design
1-3 PM ET



Presenting
1-3 PM ET

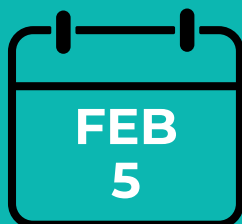


Facilitate
1-3 PM ET

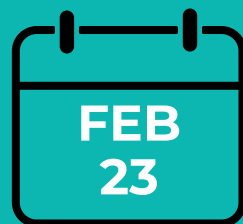
- Everyone who joins will be invited to **“practice” based on the session theme** (Designing, Facilitating, Presenting) and **receive structured feedback** from other community members. The xchage Team will guide you on how to practice and then offer feedback.
- [Click here to RSVP](#) to the practice sessions you would like to attend.

UPCOMING PROGRESS SESSIONS

Progress Sessions invite members clarify their most important priorities, gain inspiration from others and actually make "progress" through working sessions and mutual accountability.



Co-Working
1-2:30 PM ET



Accelerator
12-1 PM ET



Co-Working
1-2:30 PM ET

- Progress Sessions compose of **3 types of events: The Accelerator, the Technology Lab and Co-Working Sessions**, all with the core goal of **helping you make progress** on your conscious facilitation journey through the space of a “working” session and shared accountability.
- [Click here to see upcoming Progress Sessions](#) in the Learning Lab and learn more about the upcoming Accelerator, Technology Lab and Co-Working Sessions.

Learning Opportunities

DESIGN STUDIOS

With the xchange Team

Included for Level 2 Members

Online group coaching on all aspects of the xchange Approach, led by the xc Team

February 14 | 1-3PM ET
February 29 | 1-3PM ET

DESIGN STUDIOS

With Jon

Included for Level 3 Members

Online group coaching on all aspects of the xchange Approach, led by Jon Berghoff

FEBRUARY 7 | 12-2PM ET

- This Group Coaching format will provide the opportunity for you to connect with and learn from other community members, have questions answered on designing and facilitating using the xchange Approach and see questions and agenda designs come to life in real time.
- Based on your membership level, stay up to date on all upcoming Design Studio Group Coaching events by:
 - **All levels:** [Click here](#) to see all of the prior Design Studio recordings with the xchange Team
 - **Level 2 & 3:** [Click here](#) for upcoming Design Studio Group Coaching with xchange Team
 - **Level 3:** [Click here](#) for upcoming Design Studio Group Coaching with Jon



MEMBER INSIGHT

“Awesome Design Studio. A deep well of usable ideas and resources to integrate into my life & work. Very grateful for this generous community!”

— Terry Chapman

Unlock Collective Potential at Scale

Our free online facilitation training workshop for purpose-driven coaches, consultants, leaders, and more.



xchange 101 Transformational Facilitation Workshop

Friday, February 23, 2024 | 2:00 pm – 4:00 pm ET

Whether you're hosting an online meeting, training session, retreat, workshop, or event, xchange 101 introduces the foundational frameworks of our approach to unlocking collective potential — what we believe is the superpower of our generation.

Join us (and bring a friend or colleague!) to experience Jon share about how to:

- Shift any learning experience from passive to transformational
- Create a thriving group culture by enabling real safety and authentic connection
- Unlock the higher power of belonging, community, and collective potential in groups
- Have confidence in scientifically grounded, proven tools that get results
- Multiply your ability to create economic value and generate opportunities as a facilitator
- Deepen your fulfillment as you match your skills with the deepest human needs of our time

Grab Your Spot and Invite Others With This Link:

xchangeapproach.com/xchange-101

Upcoming Events

All Levels | Levels 2 & 3 | Level 3

JAN

- 4 Design Studio, 1-3pm
- 8 Coworking, 1-2:30pm
- 10 Tech Lab, 1-3pm
- 11 Design Studio with Jon, 12-2pm
- 17 Design Studio with Jon, 3-5pm
- 18 Practice Session (Facilitate), 1-3pm
- 23-25 ACLE
- 26 Design Studio, 1-3pm
- 26 Accelerator, 12-1pm
- 31 Adv. Training: Bus. Dev. 12-4pm

FEB

- 5 Coworking, 1-2:30pm
- 7 Design Studio with Jon, 12-2pm
- 14 Design Studio, 1-3pm
- 15 Practice Session (Design), 1-3pm
- 21 Adv. Training: Design & Facilitate, 12-4pm
- 23 Accelerator, 12-1pm
- 27 Guest Mentor, 2-3:30pm
- 29 Design Studio, 1-3pm

MAR

- 4 Coworking, 1-2:30pm
- 7 Design Studio with Jon, 12-2pm
- 12-14 OXE
- 19 Design Studio, 2-4pm
- 20 Design Studio with Jon, 2-4pm
- 21 Practice Session (Presenting), 1-3pm
- 27 Design Studio, 1-3pm
- 29 Accelerator, 12-1pm

APR

- 3 Guest Mentor, 2-3:30pm
- 4 Design Studio with Jon, 12-2pm
- 8 Coworking, 1-2:30pm
- 10 Tech Lab, 1-3pm
- 17 Design Studio with Jon, 2-4pm
- 18 Practice Session (Facilitate), 1-3pm
- 19 Design Studio, 12-2pm
- 24 Adv. Training: Presenting, 12-4pm
- 25 Design Studio, 1-3pm
- 26 Accelerator, 12-1pm

MAY

- 2 Design Studio with Jon, 12-2pm
- 6 Coworking, 1-2:30pm
- 8 Ask/Give Experience 1-3 pm
- 9 Design Studio, 1-3pm
- 15 Design Studio with Jon, 2-4pm
- 16 Practice Session (Design), 1-3pm
- 22 Adv. Training: Design & Facilitate, 12-4pm
- 23 Design Studio, 12-2pm
- 30 Design Studio with Jon, 12-2pm
- 31 Accelerator, 12-1pm

JUNE

- 4-6 OXE
- 10 Coworking, 1-2:30pm
- 12 Design Studio with Jon, 2-4pm
- 13 Practice Session (Presenting), 1-3pm
- 20 Design Studio, 1-3pm
- 26 Tech Lab, 1-3pm
- 28 Accelerator, 12-1pm
- 28 Design Studio, 1-3pm

[Visit the Learning Lab to RSVP](#)

Inside the xchange Community

Stay connected with xchange and fellow members by giving and receiving value in our [private Facebook Community](#)

#ask: From member [Cyndi Bennett](#): What daily presencing practices do you use to prepare your nervous system for the work? See what members had to share and add your feedback [\[here\]](#)

#win: From member [Jason Henkel](#) on taking action in finding and using resources from the Learning Lab. Help celebrate his momentum [\[here\]](#).

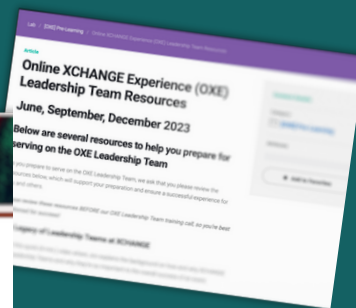
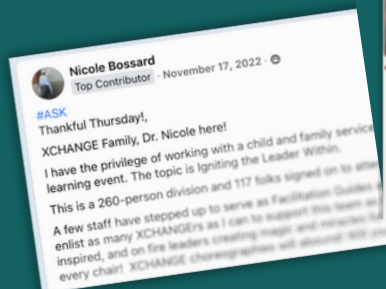
#give: From member [Wendy Shlensky](#) inviting members into a recurring tech practice time - read more and join her next zoom [\[here\]](#).

#praise: From member [Celeste Elsey](#) for [Doreen Steenland](#) and her inspiring feedback about the 3S: Style, substance and Survey. Read it [\[here\]](#).

Power of Community

Dr. Nicole Bossard

xchange member since 2020



AT A GLANCE

Opportunity

Seeking support to facilitate an online experience for over 200 child and family services staff of a human services organization with a very tumultuous history.

Outcome

Formed a Leadership Team of 14 xchange co-facilitators.

FOUR STEPS TO CREATING OPPORTUNITY

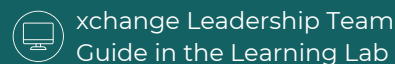
- 1. **Made a Facebook Group #ASK** for xchange members to be co-facilitators as a Learning opportunity.
- 2. **Made a Follow Up Facebook Group #ASK** for intake submissions to join the Leadership Team.
- 3. **Followed the xchange Leadership Team Guide** to create a successful learning experience for all.
- 4. **Hosted The Event** with great success and lead an immediate debrief with the team.
- 5. **Posted a #debrief in the Facebook community** to share the learnings and experience with our fellow xchangers.



Dr. Nicole Bossard

President & Positivity Strategist, TGC Consulting, Inc

RESOURCES



Celebrating Our January Certified Guides

In 2 or 3 sentences, please describe what it has been like for you to be a member of the xchange community....



Jen Dulin

“Joining the xchange community helped turn my facilitation and coaching dreams into reality! The skills I've honed in the trainings and the community I've found here has empowered me to boldly step into facilitating groups and coaching through launching my own business. What's even better is I'm not doing it alone—I lean on so many friends here. These are people who brainstorm on client challenges with me and push me to be bolder and braver. I am doing work at the mindset and heart-level in corporate spaces that I never thought possible!”



Monica Pandeale

“The past 2 years have felt like an unexpected nurtured accelerated expansion of my personal growth, especially my authenticity and vulnerability and a significant refinement of my facilitation skills. xchange is a way of life for me. I created deep friendships and lasting professional collaborations because xchange is an infinite source an space of support, love, inspiration and empowerment.”



Steven Clark

“Being a member of the xchange community has changed my life. I am working with non-profits, supporting them as an advisor and as a consultant from my prison cell. It has been a huge blessing. I am now working to help others to better understand how to lead their organizations.”

Learn more about becoming a
Certified xchange Guide [[here](#)].



Questions or need support on your conscious facilitation journey?
Want to share what you would love to see in future issues of the Facilitator's Field Guide?
Email membership@xchangeapproach.com

In gratitude, Stephanie Courtilier

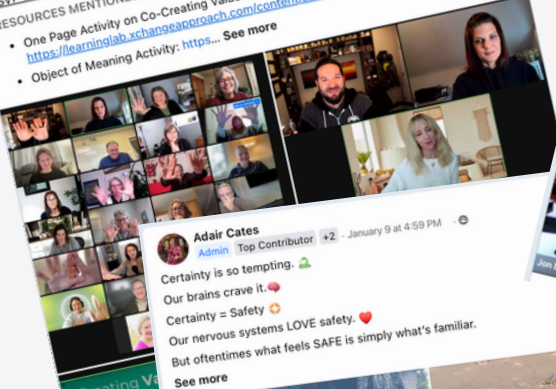
Emily Wilder Santillo is with **Steven Bouchard** and 21 others
Admin Top Contributor · January 4 at 4:32 PM

#PRAISE 🙌 Thanks to everyone who joined Design Studio Group Coaching to kick off 2024 with great questions and insights to support **Deena M Giordano Ullom**, Elizabeth Marmaras and your submitted questions!

RSVP for upcoming **Design Studios** with the **xchange Team** in the **Learning Lab**.

RESOURCES MENTIONED TODAY:

- One Page Activity on Co-Creating Values and Bringing Values to Life: <https://learninglab.xchangeapproach.com/content/activity-worksheets/>
- Object of Meaning Activity: <https://> See more



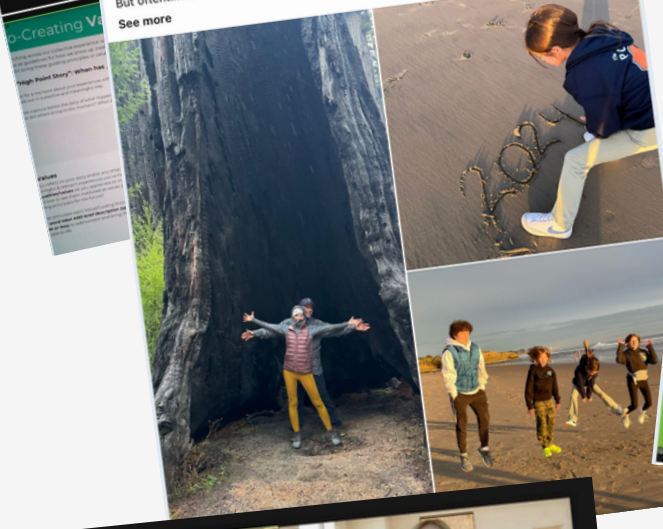
Jon Berghoff
Admin Top Contributor · January 10 at 3:55 PM · 🌐

#ASK Are you interested in learning about the secrets to building healthy community? If the answer is "yes", to this question, or any others... let me know about your interests or questions, around starting or building community, in the comments. Have you wanted to know the keys to starting or launching a community? (I share at least 3 lessons on this, in the video) Are you curious about building and sustaining a community? Would you love to understand how to enliven the... See more



Adair Cates
Admin Top Contributor · January 9 at 4:59 PM

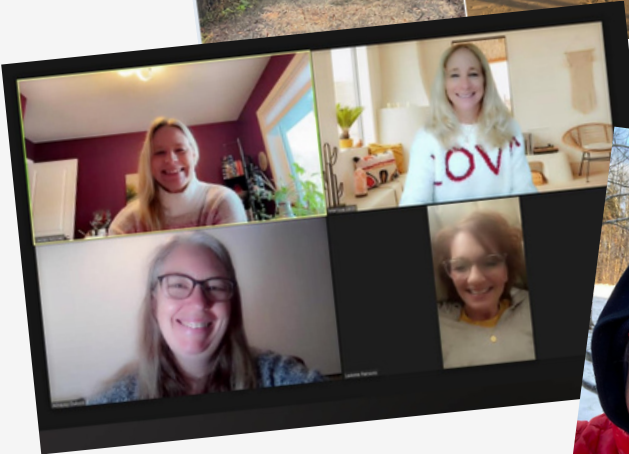
Certainty is so tempting. 🍏
Our brains crave it. 🍏
Certainty = Safety 🍏
Our nervous systems LOVE safety. ❤️
But oftentimes what feels SAFE is simply what's familiar. See more



Josh Friberg
Top Contributor · January 8 at 3:04 PM · 🌐

#praise

How much productive work can you get done in 45 min?
How much more can you get done in 45 focused minutes in a curated co-working environment?... See more



Please enjoy some highlights from our community below and click the image to see more.