

xchange

Facilitator Field Guide

2024 | March

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

- ✓ Familiarize yourself with the 3C Framework and practice redrawing and sharing about it with a fellow xchanger or to a client. Learn more [\[here\]](#).
- ✓ Become aware of a depreciative question you are asking yourself, and create an appreciative question instead. Learn more [\[here\]](#).
- ✓ Ask a Possibility: Action/Commitment question at the close of your next event, such as: “What can I commit to doing (or being) as I leave this meeting?”



MEMBER PRO TIP

*Less But Better.
There is such a
temptation to pack
the schedule.
Overwhelmingly, the
learning is happening in
the breakouts and other
interaction patterns.*

— Josh Friberg

What to Study This Month

Foundational Agenda Design

Foundational agenda design, using the xchange Approach, encourages a healthy balance between “insight” (passive delivery of information) and “interaction” (professionally designed conversations among the participants).

This full-day agenda illustrates how to apply the simple xchange Experiential Bookend to shift any agenda from passive to active, while inviting the voices and wisdom of the participants to contribute to the experience in a meaningful way.



- Click [\[here\]](#) to read more in the Learning Lab.

Important Reminders

1) 3 Reasons you NEED to return to OXE!

COMPLETE YOUR INTAKE FORM AND APPLY FOR LEADERSHIP TEAM [\[HERE\]](#)

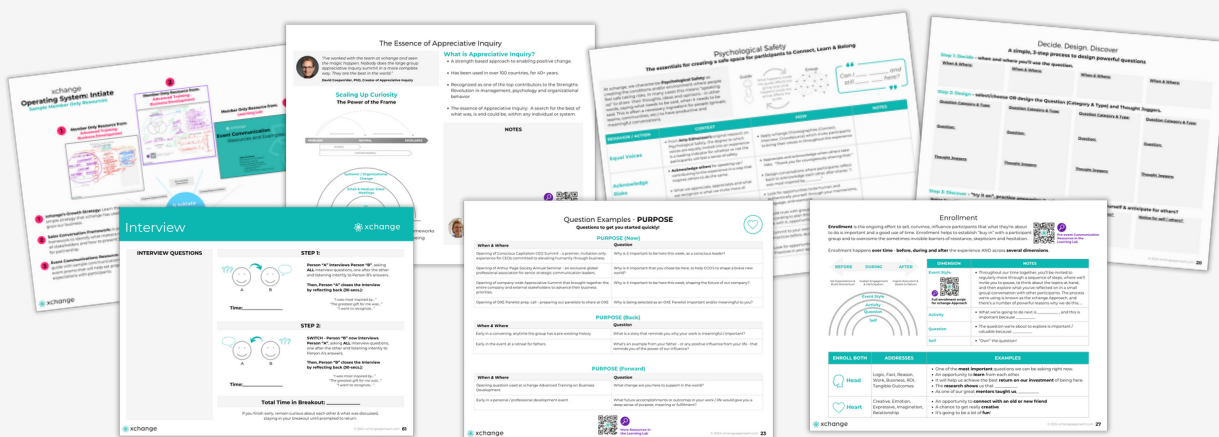
We can often make the mistake of thinking that because we've attended an experience one time, we've captured all of the learning available to us.

Given the immense passion our xchange community has for learning, I know you'll resonate with some of the core reasons below for why you will want to come back to OXE for a 2nd, 3rd, 4th, or perhaps even a 10th time!

IN CASE YOU ARE WONDERING, YES, WE HAVE SOME MEMBERS WHO HAVE ATTENDED OVER 10 TIMES!

Here are some of the Benefits of Coming Back to OXE:

#1 - Serve on the Leadership Team: As a Learning Partner, you'll have the opportunity to apply to serve on the Leadership Team, which satisfies a certification requirement. If you are on the [Guide Certification path](#), this is your chance to get one step closer to completion!



#2 - Experience New Content: We're constantly updating and enhancing our content and workbook to provide fresh insights and valuable learning experiences. By returning as a Learning Partner, you'll have the opportunity to engage with our latest content and stay at the forefront of knowledge in our field. Our March 2024 workbook includes new content on the topics of Enrollment, Psychological Safety, Question Examples, Design Techniques and more!

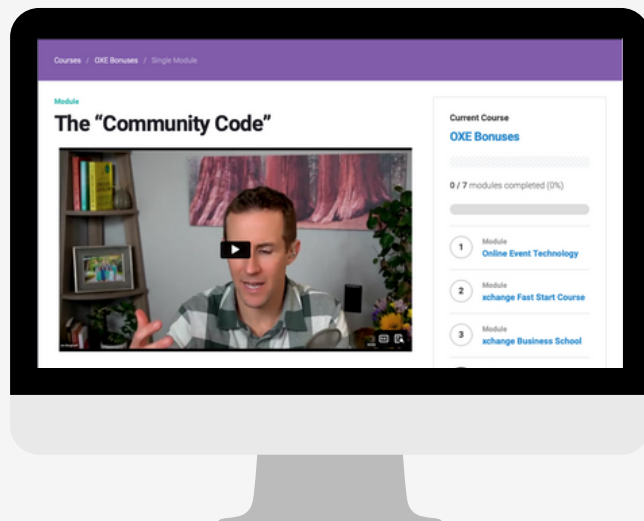
#3 - Practice the xchange Approach Foundations: Our Online xchange Experience provides an ideal environment for you to practice and refine your skills in applying the xchange approach foundations. You'll have the chance to collaborate with peers in a supportive setting and deepen your understanding of our questions, choreographies and core frameworks.

2) The Community Code

Stephanie Courtilier, Community Steward of xchange, interviews Jon Berghoff, Founder of xchange, on his insights into community building in “The Community Code,” the newest addition to our OXE Bonus course.

In watching [The Community Code](#), you will learn the following:

- Jon’s thoughts on why community matters, particularly for those interested in facilitating groups using the xchange approach.
- The origins of xchange’s interest in community and key learnings from starting and nurturing a healthy community.
- How Jon defines community, and his detailed strategies for both engaging and growing a community.
- How the xchange approach fosters community
- The future of community building, including the importance of evolution and relevance.



Click [here](#) to enjoy the Community Code!

3) An Exploration of the 2024 SessionLab State of Facilitation Report

RSVP [here](#) to join us on March 28th from 11:30am-1:00pm ET for a Guest Mentor session with the SessionLab team as we explore the State of Facilitation Report findings.

SessionLab was the first to conduct a comprehensive survey on the state of facilitation in 2023, with the goal of creating a comprehensive report on the facilitation profession, as a resource for facilitators everywhere. **This report helps us to better understand the profession of facilitation, share insights, and promote discussions in and beyond the global facilitation community.** Now in its 2nd edition, the 2024 State of Facilitation report explores how facilitators work, how facilitation is evolving, the tools and resources used by expert facilitators and more, based on input from 975 respondents across 93 countries!

During this Guest Mentor Session **we’ll explore some of the key findings and insights revealed in this year’s report** and also offer a quick overview of the SessionLab digital agenda tool for those who may not be familiar with this powerful resource!

Access the 2024 State of Facilitation Report [here](#).

RSVP to attend [here](#).



Andy Pearson,
Head of Customer
Success at SessionLab



Deborah Rim Moiso,
Facilitation Content
Writer at SessionLab



Experiences-in-a-Box

“Done for You Agendas” to Get You Started!

This **bonus module** has everything you need to get started designing and facilitating transformational experiences using the xchange Approach!

We’ve included FOUR practical and easily implementable “experiences-in-a-box” that you can get started with immediately.

In addition to the summary PDF agendas, you have access to very comprehensive and detailed digital agenda templates in our SessionLab **xchange community library**. The SessionLab agenda templates include timing for individual steps, formatted chat drops for sharing on Zoom, enrollment language and more!

Choreography and Timing	Activity Details	Questions
8:00am (0-min)	Welcome & What to Expect	
8:10am CONNECT (05-min)	Connect with personal sense of purpose	Purpose (Block) What is a story that reminds you of why the work you do is so important and/or meaningful?
8:35am INTERVIEW (30-min)	Interview (Questions)	1. Past High Point Story When have you been part of an exceptional experience? What was it? 2. Present (Bookend) 10 minutes from the change or make-it-“Success” experience, what should stay the same? 3. Possibility Future Image: What would you've most like to be celebrating in one year from now?
9:35am BREAK (05-min)		
9:50am CROWDSOURCE (30-min)	Crowdsource	Past High Point Story When have you been part of an exceptional learning experience?
10:50am BREAK (05-min)		
11:00am Group Presentations (30-min)	Group present their “Recipes for Success”	
11:30am CONNECT (05-min)	Closing Active Learning Cycle	Present (Active Learning) Most valuable insight or learning?

Choreography and Timing	Activity Details	Question Options
11:00am (0-min)	Welcome & What to Expect	
11:10am CONNECT (05-min)	Opening Connection	Purpose (Block) Connect with why it's important to be here. Past (High Point Story) Connect with the content to be explored.
11:35am INSIGHT (30-45 min)	Insight / Content	Present (Active Learning) Most valuable insight or learning? Present (Appreciation) Gratitude / appreciation for presenter?
12:05pm CONNECT (05-min)	Active Learning Cycle	Possibility (AI/CS) How will you apply what you learned?
12:20pm (5-min)	Survey, Logistics, Announcements	
12:25pm (5-min)	Healthy Closure	Appreciation & Gratitude? One word for how you're feeling? Most excited about?

Click to Explore these Bonus Course Resources in the Learning Lab!



Member #Debrief



Denee Choice
Mastery (Level 2) Member
Member since September 2023

Online Community Kickoff January 2024

EVENT DESCRIPTION

Series of three free online meetups for this group before I launch a paid 6-month program in March. I'll continue to offer the free group meetups once monthly for those not (or not yet) interested in the paid program.

HIGH LEVEL AGENDA

12:00 PM	Welcome	5m
12:05 PM	Session Overview & Exp...	5m
12:10 PM	Introduce opening purpo...	7m
12:17 PM	Small group breakout se...	10m
12:27 PM	Report outs	5m
12:32 PM	Introduce #ASK / #GIVE	5m
12:37 PM	#ASK / #GIVE choreography	13m
12:50 PM	Survey + Music	5m
12:55 PM	Close with heart	5m
1:00 PM	Final announcement	2m

1:02 PM

TOP LEARNINGS

- It's challenging to get people to show up to free calls/events. I received numerous messages that they "couldn't make this one" but would come to the next one. These women all seemed to see the value of these networking/connection meetings but only about 30% made it to one of the calls.
- It's hard to facilitate alone (yes, I know ...don't design alone/don't facilitate alone!). I managed the Zoom and watching session lab for timing fine, but didn't use music as I had planned, and I have a hard time watching the chat (it's too distracting for me unless I'm specifically asking them to post an answer to something and there's time for me to watch for responses).
- It's important to give the survey IN the session and not after the fact. One time I forgot to share it in the session and give them time to complete it, so I sent it out after. That's' when I got the comment that the form needs to be shorter and the answers shouldn't be required.

CLIENT TYPE: Women leaders in medicine

EVENT TYPE: Virtual

IMPACT LEVEL: Independent MDs and DOs in various medical leadership positions across the US

DURATION: 1 Hour x 3

PARTICIPANT TESTIMONIALS

- "This form needs to be shorter and fields need to be optional, not mandatory
- I think a group like this has a lot of potential. When I think about the large fees that groups charge for networking and support (think: Chief), an opportunity for professional women with similar education backgrounds from all of the country to network and support each other is appealing
- Like-minded people for support and advice.
- Structure, safe space, openness without pressure, kindness, relevance
- Community
- Thank you for organizing this



Click to see Denee'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.



Presenting
1-3 PM ET



Facilitate
1-3 PM ET

Ezra Max shares why xchange Practice Sessions offer opportunity to practice your skills in a safe (and fun!) environment

- 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

MARCH 19 | 2-4PM ET

MARCH 27 | 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

MARCH 20 | 1-3PM 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

“Thank you to everyone for creating such an awesome session, and especially to Steven Bouchard for such incredible and helpful suggestions and feedback. I just love the learning that happens inside these Design Studios”

— Lesley Moisey

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, March 21, 2024 | 12 – 2 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 Ask / Give, 2-4pm
- 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
- 21 Practice Session (Presenting), 1-3pm
- 27 Design Studio, 1-3pm
- 28 Guest Mentor, 11:30am-1pm
- 29 Accelerator, 12-1pm

APR

- 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

- 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 **Marybeth Gustitus** around crowdsourcing ideas for an executive leadership team around finding common ground, managing change and an optimal framework to operate. Click [\[here\]](#) to read more.

#praise: from member **Nancy Hand** sharing her gratitude for fellow xchange members who stepped up to support her Breaking Bread event. Watch her video [\[here\]](#).

#win: from member **Reizel Larrea-Alvarez** on how she used the xchange approach to quickly pivot from a 1 hour agenda to a full day! Read more [\[here\]](#).

#give: Member **Kit Brown-Hoekstra** shares the 4 statements that lead to wisdom [\[here\]](#).

[NEW!] Featured Question of the Month

Many of our xchange members have done a great job leaning in to ask for support from our membership team at membership@xchangeapproach.com.

This month we noticed a theme in questions about **enrollment**.



My question is ENROLLMENT Videos... I need help with enrollment verbiage for the choreography of my next event. Can you direct me to the 3 videos that you recommend I research?

JESSE WRIGHT

Here are some of our recommended resources on the topic of enrollment:

Foundations (L1) access:

- Enrolling in the xchange Approach [\[here\]](#)
- Enrollment for the Head and the Heart [\[here\]](#)
- Jon coaching from OXE on enrollment [\[here\]](#)
- Bringing values to life activity enrollment [\[here\]](#)

Mastery (L2) and Mentorship (L3) access:

- Enrollment Sample Audio for the Treasure Hunt Activity [\[here\]](#)
- LIVE with Jon: Seductive Facilitation - 4 levels of enrollment [\[here\]](#)

Power of Community

Steven Matthew Clark & Marni Task



AT A GLANCE

Opportunity

Seeking a deeper connection after hearing about one another through xchange events

Outcome

Co-creation of Prison or Ashram program and a growing friendship



Steven Matthew Clark

Instructional Facilitator,
Awakening Facilitator, Coach
Member Since 2022



Marni Task

Certified Yoga Instructor/
Creator Indu Aromatherapy
Member Since 2020

FOUR STEPS TO CO-CREATION



Reach out through the Member Profile to add value

Both Steven and Marni learned more about each other using the xchange [Member Directory](#) and reached out to schedule a follow up connection call.



Zoom Call Meeting of Hearts & Minds

During their connection call, they instantly realized the connection they had with similar interests and passions for applying the xchange approach. They had more conversations and soon a program idea was formed.



Co-Creation of Prison or Ashram Program

Together they co-created the Prison or Ashram program weaving in the xchange approach as well as learnings from the Awakening Conscious Leadership Experience.



Lean into Creative Tension

Both highlight the importance of leaning in to creative tension, and how helpful the micro training on this from xchange has been in navigating what could otherwise be more tense and stressful conversations. They are currently happily expanding on the vision for their program!

RESOURCES



Steven & Marni's
YouTube workshop
promo video



xchange Micro Training on
Navigating Creative Tension
in the Learning Lab



Certified Guide News



We asked our newest Guides to describe what it's been like for them as a member of the xchange community....



Doreen Steenland

"I love this community. I have found this community to be one of the most loving and generous communities I've ever experienced. Conscious leadership modeled here creates an atmosphere for vulnerability, trust and growth. I'm amazed by the group members who are willing to collaborate and help you to shine your brightest."

Barb Koetsier

"In a few words - growth and support and encouragement and next-level-vision. The community is filled with brilliant people eager to support, plenty of opportunities for learning, brainstorming and creativity, and evolving methods to allow everyone to level up."



NEW! Updates to Guide Certification Requirements

[Visit the Learning Lab](#) for more information on the **NEW Certified Guide Requirements, applicable to ALL members, effective March 15th!**

1	2	3	4
<h3>Learn</h3>	<h3>Apply</h3>	<h3>Engage</h3>	<h3>Qualify</h3>
<p>Build Your Skills with Educational Hours</p> <ul style="list-style-type: none">● Earn (70) Educational Hours by attending at least:<ul style="list-style-type: none">• (2) OXEs• (1) ACLE• (4) Advanced Trainings● Serve on an xchange event Leadership Team	<p>Practice What You've Learned</p> <ul style="list-style-type: none">● Post (8) #DEBRIEF Posts in the approved format	<p>Deepen Your Learning</p> <ul style="list-style-type: none">● Remain an Active Member of xchange, where you can Connect, Learn and Belong with other purpose-driven change agents	<p>Complete the Certification Process</p> <ul style="list-style-type: none">● Submit Your Application● Successfully Complete the Core Competency Exam

What's changing? We've updated our "LEARN" requirements to match our current training offering. We also shifted to an "educational hours" format (currently at 70), which offers more flexibility to our members as new training programs are released.

[Read More in the Learning Lab](#)

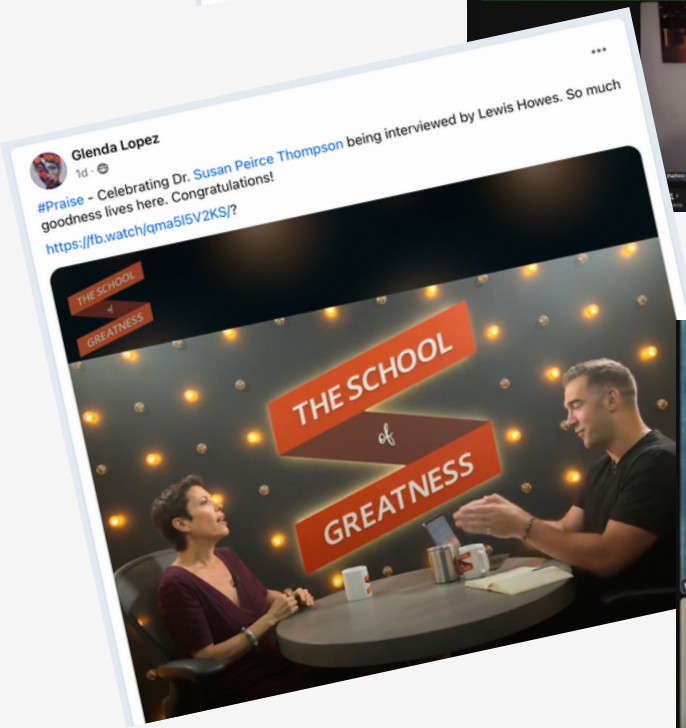
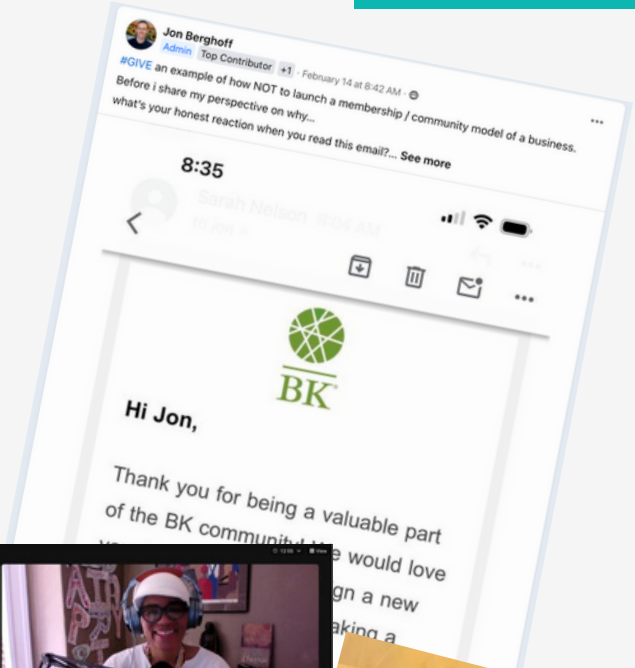
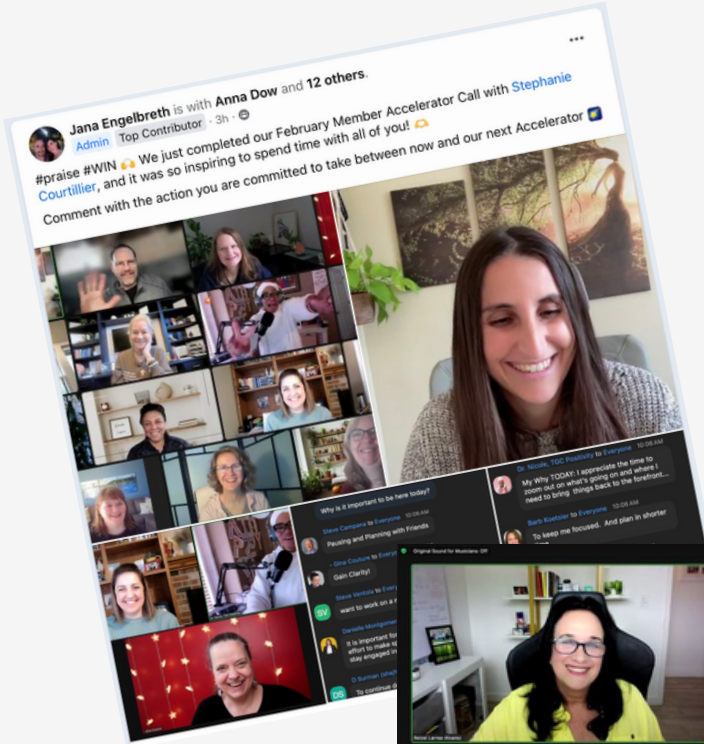
The "QUALIFY" stage of the process now includes a Core Competency Exam to ensure all Guides have mastered the foundational knowledge required.

Other aspects of the certification process and requirements remain the same.

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

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



Connect with xchange

