

## **What Facilitating a Wedding, a Funeral, a Bat Mitzvah, and a Board Meeting Have in Common**

Over lunch with a colleague last week, I described the memorial service I'd recently held for my mother in Cleveland, at the marbled and stained-glass mausoleum of my childhood synagogue. She listened closely and then offered with a smile, "Do you remember what one of your guests said to me at your daughter's bat mitzvah?" (an event we'd held some fifteen years earlier). "Several minutes into Talya's service, the woman sitting next to me leaned in and whispered, 'Were you at the wedding? This is *just* like the wedding!'" She paused for a sip of coffee and then added, "Your mother's memorial service sounds just like that!" I realized she was right.

I'd worked really hard to design each of these events. Each had its own purpose and mood, calling on me to play different roles. My woodland wedding needed to show that my husband and I were committing to the world as well as each other, making space under the huppah for our golden retriever and friends. Our daughter's bat mitzvah needed to capture the depth of her convictions. Mom's memorial had to celebrate her abundant passions while acknowledging her maddening demands.

I cared about the food and the setting, but I cared more about showing up with integrity. My purpose for each "gathering" – to borrow a term from master facilitator Priya Parker, whose insights I've found valuable – remained the same: to produce a meaningful experience that nurtured connection among people who had come together to bear witness.

This same priority shows up in my day job as a strategy consultant. To help colleagues think, plan, and act together, I'm often called on to design and facilitate meetings for a foundation or nonprofit's board, executives, or senior staff. Meeting objectives vary: to design new work or refine existing efforts; seize emerging opportunities or tackle tough challenges; share successes or discern lessons from stumbles; brainstorm possibilities or make tough decisions.

But regardless of organization type, participants, and purpose, my behind-the-scenes intentions echo the personal gatherings I've crafted: to help different people feel seen, heard, and able to contribute. To foster bonds that distribute power more evenly across a group, if only for a moment in time. To learn individually and collectively, tapping the experience of those who come together and those beyond our immediate circle. And to send everyone off with a party favor of sorts – something that helps them carry what they've gleaned into what follows the time we've spent together.

**So, what *does* facilitating a good wedding, funeral, bat mitzvah, and board meeting have in common?** Stirred by my colleague's observation, here are some of my top insights.

## 1. Invite the whole person.

People bring all their complex bits to a gathering, but too often our meeting design pretends that what's *not public* simply *isn't there*. We lose an opportunity for authentic engagement when that happens.

In opening Mom's memorial service, I related how people she'd engaged with day-to-day responded to news of her passing. "Your mother was an experience!" Brett the cat groomer exclaimed. "She never held back and she sure talked a lot," admitted Nicole, the dry cleaner. Zachary, a doorman in my Mom's building, offered with a chuckle, "Mrs. Fine, Mrs. Fine – you always knew *exactly* what was on *her* mind."

Lacking a self-censoring gene had caused Mom problems in life, including bumpy rides with some of our service guests. I suspected this rodeo was on their minds. Calling it out gave us permission to laugh and to right-size the space it took up in Mom's fuller profile. Remembering Mom's own complex bits helped us be realer with each other, and with our grief.

I made similar space for the felt-but-unseen when facilitating a retreat in Boston a few years back. Board members had gathered to consider adopting a new strategic plan. Striving for full consensus, I pulled out all the stops: persuasive presentation of the new strategy by organizational leaders; full group discussion; priority-setting captured by individually-placed red, green, or yellow sticker dots signaling degrees of buy-in; group reflection on collective priorities that emerged; time for reorganizing one's dots informed by others' input; and more rounds of discussion still. We talked in pairs, in huddles clustered by degrees of agreement, and in random groupings. Eventually, all but one board member indicated they were ready to adopt the new strategy. But with each new group constellation, our sole outlier stepped on the brakes.

I feared we'd unravel the near-consensus we'd reached if we kept going at it. Board members were running out of steam, and so was I. Hoping my spirit of inquiry would outshine my diminishing patience, I asked the board member who was not yet on board, "Would you be willing to share what's holding you back? Do you have specific concerns anyone here might be able to address?" This colleague sat silently for a minute, and then shrugged. "Not really," she admitted, as much to herself as to the rest of us. "I actually like where we're heading and can get behind it. But this will be a big change for us, and I want to make sure we think through every single bit carefully with each other. I know I've been stalling things, but I'm glad we've taken this time. I think we'll be stronger for it. I'm all in."

I learned from these experiences that playing only to the visible restricts a gathering's emotional register, and that can get in the way of how fully someone is willing to join in. It helps to recognize and quiet the *internal* dialogue each person is having so it doesn't drown out the public conversation taking place on main stage. I'm not arguing for compulsory sharing

here; I'm arguing for intentionally *welcoming* and *channeling* what lies beneath the surface – in other words, for inviting the whole person in.

## **2. Honor different ways of knowing.**

Gatherings gel when people participate; even the most accomplished facilitator depends on the willingness of others to speak up. Sometimes the people I convene hold back more than I'd like them to, particularly at the beginning. No one says out loud why they're being quiet; it's my job to intuit and navigate submerged barrier reefs.

I've learned that program staff in professional settings may be hesitant to share their grounded knowledge, mindful of power differentials and other institutional dynamics. Executives, in turn, may wish to show they're good listeners who will not use their authority to suck up space. Personal gatherings I've led present variations on this theme. A wedding guest wonders, "Do I know this couple well-enough to make a toast?" The memorial guest asks, "Will my words of condolence sound foolishly inadequate at this vulnerable time?"

I believe the habit of self-silencing reflects a similar pool of anxieties, regardless of context. Across settings, gatherers privately wonder: Am I legitimate here? Is my voice valid? Will the benefits of speaking up outweigh the risks if I don't get it quite right? Is my relationship to (fill in the blank) close enough to count?

To break through self-doubt, participants need to trust they should be right where they are. Even more, they need to trust other gatherers think they should be there, too.

I've used various approaches to cultivate this private and shared sense of legitimacy. Welcomings are my first opportunity. Ice breakers are a facilitator's easy go-to, but I'd argue we often make poor use of this time. In today's virtual settings, stating one's name can feel superfluous if it's already in view on the Zoom screen. Call me grumpy, but sharing a favorite dessert or recently watched TV show strikes me as irrelevant (though now and then interesting, I'll admit). To validate everyone who shows up, I prefer openers that name how each participant's experienced hitches to why we've come together.

For example, years ago I facilitated dialogue among members of a funder collaborative investing in educational justice. I began our meeting by asking each person to pull a coin out of their pocket and take note of its date. Then I said, "Please share something about education that took place around the time your coin was minted – anything counts." After a few moments of silence, a funder who had drawn a nickel from 1970 recalled doing her homework at the kitchen table while her Vietnamese mother studied English vocabulary words by her side. In this colleague's memory, her mother's assimilation experience and her own elementary school education were intertwined. Another colleague drew a 1954 penny; she cited the *Brown v. Board of Education* Supreme Court decision, juxtaposing it with her memory of her own high school's racially segregated cafeteria tables some thirty years later. The funder who held a

1968 dime described her fourth-grade teacher, whose intensely inquisitive, highly personalized instructional approach captured everything she has come to believe constitutes good teaching. These and other self-introductions located us in time and reminded us of the vital role education has played in our lives. We connected to each other through our different but recognizable experiences. And we grounded ourselves in our reason for coming together – to ensure an equitable opportunity to learn for all.

The bat mitzvah ritual holds similar opportunities for welcoming, naming, and legitimating. Two moments stand out in my own daughter’s gathering, in keeping with others I’ve attended as a guest.

The first opportunity took place during the religious service, when my daughter called up people of special importance to her to recite special blessings that bookended her reading of the Torah (the “Aliyah”). My daughter invited her closest family members to join her in waves: first two grandmothers; then uncles, a great aunt, and close cousins, followed by her brother, my husband and myself. This very intentional and public naming, honoring, and legitimizing stretches back thousands of years. To all who have gathered it signals in the same breath: these people are essential to me, and so I’m honoring them here; this holy book is essential to us, so we’re reading it together; and this practice unites our community across time, so I’m repeating a ritual practiced for ages.

A second moment of affirmation has no religious roots but is just as expected in the commercialized bar and bat mitzvahs of New York City today. This opportunity centers around the post-service party cake. During the celebration following my daughter’s service, she again called up waves of guests – this time, 13 of them – to help her light each of the 13 candles on her cake. As each grouping came up to the dessert table where my daughter presided, she recited a limerick she’d crafted to capture their importance, accompanied by a song fragment reflecting this special relationship. Uncle Brandon had always been a mentor; he walked up to *“To Sir with Love.”*

I’d argue that this modern-day ritual serves a purpose similar to the “Aliyah” and to the well-chosen ice breaker in a professional setting. Simply put, it acknowledges difference among a group of gatherers; honors each participant’s relation to the person-topic-challenge that animates a group’s reason for coming together; legitimates their presence; and nurtures a sense of inclusion that fuels both individual and collective voice.

### **3. Be specific.**

The writer Eudora Welty once famously said, “One place understood helps us understand all places better.” Or as the poet William Carlos Williams put it, “No ideas but in things.” Being specific in a gathering accomplishes two ends: it ensures authenticity, and it helps deepen understanding.

At Mom's memorial service, my daughter and son took turns reading testimonials we'd collected from various people who knew mom well, each representing a different part of her life. These reflections shed light on how Mom showed up in the world, and what the people who knew her in different ways appreciated about her. I followed with an itemized list of Mom's greatest loves. From transatlantic ocean liners (the SS France, the Queen Mary), to elegant men (Peter O'Toole, Barak Obama), to TV shows (Downton Abbey, Queer as Folk), I hoped the eclectic cacophony would capture Mom's richness as well as her contradictions.

At our wedding, our closest friends adapted the recitation of seven traditional blessings into modern-day equivalents specific to how we hoped to show up as individuals, and as a couple. Mindful of our respective political commitments, atheism, and cultural identity, my husband's oldest friend, Joey, urged us to "make children and pass on the Jewish heritage of struggle and hope for liberation," recalling the Polish, Marxist, Isaac Deutscher's "solidarity with the oppressed." Another friend took things in a different direction, wishing us "generosity, warmth, insight, and support" – qualities she felt we each gave freely to others. Not surprisingly, all seven of our friends wished us good things and said only nice things about us; it was a wedding, after all! But despite the glossy sheen, their affirmations rang true because they reflected characteristics and commitments our guests knew us to carry. Retrofitting traditional blessings connected our community's past to our present to our hopes for the future.

I've found it similarly helpful to call in the specific in professional gatherings. For example, organizational boards convened to approve grant allocations are often helped by hearing directly from an organization's grant partners; learning what enables and thwarts successful work helps members recognize that outcomes depend not just on a grant partner's smarts, but also on their capacity to deploy these smarts; a network of allies to leverage them; and environmental conditions that enhance rather than impede their making progress.

In my work over the past few years with foundations embracing racial equity commitments, I've found that specificity can be a sticking point. It's comparatively easy to embrace aspirational concepts; sustained buy-in requires more granular understanding of how they'll translate into practice. Making space to discuss concrete data, consider illustrative examples, deliberate over trade-offs, and identify operations that may need to change enables grounded decisions that are likely to last.

In short: specifics help us see better, and nurtures our authenticity in embracing what we see.

#### **4. Take the time you need.**

Most gatherings wrestle with a common challenge: having too much to cover in too little time. It's hard to resist packing lots in. There's always so much that needs to be addressed. Finding common meeting time is hard, and the denser the program, the more everyone's time appears to be well-utilized.

It seems counterintuitive, but I've found that thinning things down helps to thicken things up. Deep reflection comes from taking the time to  *dwell*. When facilitators resist the tug toward activity flurry, we give gathering participants more time to make meaning individually and with each other.

What does this look like in practice? In professional settings, it can mean asking richly difficult questions, and disciplining ourselves to pose just one or two of them at a time. When we trust participants to unpack complex things, they'll inevitably take our prompts in different directions, adding more questions and nuance of their own. It can also mean building in time for people to think privately (through reflective writing, for example) before inviting them to voice their opinions out loud. Sometimes it can mean pausing these conversations mid-stream, making space for iterative reflection in the midst of dynamic public exchange. I'd argue that it might also mean urging participants to refrain from multi-tasking – to stay put with each other on the Zoom screen, rather than to bounce back and forth between Hollywood Squares and the Chat function, which to my mind diminishes rather than deepens our ability to listen well.

We tried hard to listen well to each other during our long-ago wedding. Our “scope and sequence” adapted the customary Jewish wedding arc: my husband and I each processing across a verdant lawn, arms linked with our parents and siblings, to meet up under the huppah (in our case, a banner from the Bread and Puppet theater troupe); the rabbi's welcome (referencing the people and places that had given most meaning to our lives, such as my childhood summer camp); our exchange of vows (jointly crafted, edited, and re-edited more times than I care to remember), followed by our exchange of rings and then the personal reflections we'd written for each other (the only service element we'd not painstakingly co-constructed); our friends' highly customized seven blessings; and stepping as one on a champagne glass wrapped in cloth (reinterpreted by us to signify not the destruction of the Temple in Jerusalem, but the ongoing destruction of the world that we committed to repairing through our lives together).

Friends and family far more “objective” than I am would agree it was a beautiful service. But perhaps just as beautiful was the time we spent over toasts afterwards, when friends and family stood up one by one and spoke from the heart, sharing stories, memories, and wishes for us that were specific to who they knew us to be and who we wished to be.

My father-in-law, Misha, spoke the longest by far; to be truthful, at the time I worried he spoke far too long. He had come from the very different world of pre-war Poland, managed to survive the war, found and married his sole remaining relative, and made a new family and new life for himself, first in Queens, and then in Jerusalem. Misha's toast reflected his challenge to make sense of our reinterpreted Jewish gathering and the life we were embracing together. While we'd studiously avoided explicit homages to  *marriage* and the joining together of  *woman and man* throughout our service, aware of our heterosexual privilege and wanting to honor all

forms of loving, Misha quoted the Talmud (in Hebrew and in English): “This woman to this man! This man for this woman!” He reminded us that “the Lord says a single woman or man is but one half of an entity and the Divine Presence dwells only with the complete, the whole, and the perfect.” I loved my father-in-law, but I cringed a bit. It's taken me longer than it should have, but in remembering his words now in the context of these reflections, I realize he did that day exactly what I'm encouraging here: he took the time he needed to make meaning. These many decades later, I'm able to see that by offering us his very different way of making sense, he rendered our experience more complex. I believe our gathering was richer for it.

## 5. Open and close with power.

I've seen skilled facilitators open meetings elliptically, drawing participants into a story whose relevance only becomes apparent over time. I envy the magic but can't pull it off. I like meetings that lay out what we're gathering about; how our time will roll to meet our objectives; and when folks will be getting a bathroom break. I believe these practical guideposts are useful, and to hold in check the anxiety of control freaks like me they're best offered up early – but not, I'd argue, right at the beginning.

Powerful beginnings are the facilitator's friend, especially when authentic to a gathering's purpose. They shift attention away from where we've been and towards where we're going. They help us *choose* to hit pause (or at least to turn down the volume) on the white noise we carry with us into the new meeting space, giving us a more compelling reason to *be here now*. If it's difficult to make this shift when we meet in person, it's more difficult still when we meet by Zoom screen; it's just so easy to multitask without getting caught. In COVID times, I've found compelling openers more important than ever. They help me make the case that it's in everyone's best interest to put down the cell phone and pay attention.

Some of the best openers I've experienced invite us to hear or see differently than we'd anticipated and prepared for in entering a professional space. Music, visuals, or poetry, for example, engage parts of ourselves not frequently tapped when we convene to diagnose, plan, and problem-solve together. They help shift our altitude, opening up space for deeper listening and wider imagining.

Powerful closers are just as important, also serving to connect us with our fuller selves. Strong closers make space for shared reflection before we rush back into our busy lives, nudging us to remain present for just a little bit longer, even as we're tugged to look at the clock. I like meetings to end by organizing the time we've spent together: reviewing what we covered; surfacing what worked well and what could have gone better; naming key take aways; and spelling out next steps. But to my mind, this instructional clarity should not come as a gathering's very last thing, any more than it should come at its very beginning. To work best, this bookended guidepost must precede a more dynamic final closer – something authentically relevant to how we've spent our time that takes our work up a notch or two. Powerful closers

honor where we've been while providing an off-ramp that leads back to our separate lives; their slope helps us roll new insights into work going forward.

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A longtime fan of the Alvin Ailey dance troupe, my mother's favorite song was *Rocka My Soul in the Bosom of Abraham* from their signature performance, *Revelations*. Many years before her own ending appeared imminent, she instructed me to play this song at her funeral.

It was my closer. As my brother, cousin, and I carried Mom's urn to her final resting place, we blared this gorgeous gospel music through the mausoleum's marbled hallways, undoubtedly the first time music of this kind had found its way there. It felt infectiously joyous, a fitting tribute to a woman whose complexity demanded a nuanced narrative, but one that surely included unchecked exuberance as part of its telling.

As daughter-facilitator, the music helped me carry my own bucketload of emotions even as I carried my Mom, encouraging me to bring this fullness into all the years that lie ahead for me without her.