

Community Foundation Role Plays

Group Leader Instructions

1. Tell the group they will facilitate in pairs and have them partner up.
2. Let them know they will facilitate for 5 minutes followed by a 3-5 minute debrief
3. Read the case study scenario aloud to the group.
4. Pass out copies of the case study.
5. Give them 5-minutes to strategize with their partner.
6. Ask for brave volunteers to go first.
7. Ask for volunteers or assign character roles.
8. Have the remaining participants act as supports to the facilitators. Let facilitators know they can "call a friend" if they get stuck.

Note: Both case studies include multiple adult children so feel free to decrease the number of children in the scenarios if you need more support people on the sidelines. I recommend at least two.

Debrief

Give the facilitators a moment to take a deep breath by starting the debrief with the group as a whole. Feel free to pare down the questions as appropriate given the time and what is most needed for learning in your group.

All: What did you notice about this facilitation that worked in this scenario? What strengths did these facilitators bring to the process?

Facilitator: What was this experience like for you? What did you notice? What other strategies might you use if given more time?

Clients: How did this facilitation work for you? What did you notice about taking the client perspective?

Case Study 1: Divergent Interests

BACKGROUND

When Marion Dutton died her children and grandchildren learned she had established the Dutton Family Fund at the Community Foundation with the directive that they fund a cause / causes they could unanimously agree upon.

Marion had two daughters, Dana, (65) whom she was very close to, and another whom she had disinherited thirty years ago. However, that daughter's children, Abbey (42) and Rachel (37) were close with their grandmother. Dana and her son Henry (27) are advisors to the fund along with Chip (61), the personal trainer that married Marion when she was 91. Each of these five advisors identify strongly with vastly different issues and are skeptical that they will find any cause in common. You have given them a survey of issue areas and they have chosen those that they most care about, further categorizing them as primary or secondary concerns. As expected there was no commonality among the causes of greatest import to them individually but the surveys reveal that among their secondary issues, they *all* share an interest in two areas – nutrition and land preservation.

ROLES

Facilitators: You are meeting with the Dutton Family for the first time, though you have spoken to each by phone. Your job is to help them define more specifically what they would like to fund. In this role-play you will facilitate a conversation to help them discover the types of programs they may wish to fund. You will start by inviting them to share their individual perspectives on the issues that need to be addressed within nutrition (academic research into nutrition? Addressing hunger? Improving school lunches? Other?) and land preservation (Land trusts? Preservation of state parks? National parks? Reforestation?)

Dana (65): Has an MBA from Harvard and shortly after graduating, she founded a very lucrative handbag business. She considers herself the leader of the family's philanthropic endeavors (and others) as the "next in-line to the throne." She now serves on the boards of the Center for Environmental Sustainability, the Agricultural Alliance and the Jazz Center. Her primary concern is the environment and had convinced her mother to allocate 25% of her funding to the environment, though that wasn't Marion's interest. Dana is forceful and outspoken and especially skeptical that this process of finding shared interests will work.

Henry (27): Began his career as a financial analyst but has recently left to help a friend start a non-profit focused on youth sports. The life lessons he learned while a member of the high school baseball team profoundly affected the course of his life so he is passionate about the transformative power of sports. However, he is new to the “whole philanthropy thing” and just wants to sit back and observe. He is on a group chat so intermittently sends texts during the meeting.

Abbey (42): Has two teenage sons and a younger daughter. She was recently divorced and has a very full plate as she has just started nursing school. She was closest to her grandmother and wants to be sure they continue her legacy and fulfill her wishes that the family find common ground and get along. She is worried that her Aunt Dana will steamroll them into funding more of her environmental causes. She cares most about funding her church and veterans organizations.

Rachel (37) – Never quite found her way into a career and never married or had children. She has devoted her life to cat rescue, acting as a foster “mom” and funding animal awareness campaigns.

Chip (61) – Specializes in training and rehabilitating stroke survivors. Marion left a small bequest to the Pacific Stroke Foundation but he had hoped she would give more. He treated Marion well and the family is grateful for that, even though his motives may have been monetary at the outset. He feels that he is an equal in the family.