

Facilitation Fundamentals

Defining Your Role

- Clarify roles – as facilitator or content expert, “ambassador” for the community foundation
- Know when to be responsive and when to be a leader
- Make space for everyone to speak – encourage those who are quieter, not interrupting
- Keep meeting on focus
- Set aside your own prejudices

Planning

- Have background on participants (interview in advance when possible)
- Create an agreed upon agenda and clarify meeting purpose
- Think about desired outcomes and “take-aways”
- Set up room for good communication and adapt to meeting location
- Bring important documents: current statements, recent grants, etc.

Setting the Stage

- Help to create ground rules
- Determine decision-making method
- Review and affirm accomplishments
- Create clarity about expectations – revisit goals for the day
- Determine minimal acceptable and ideal outcomes
- Acknowledge the inevitability and positive potential of disagreement and conflict

Managing the Meeting

- Listen as an ally – e.g. ask questions, check for understanding, show empathy, use open body language, suspend judgment, be curious
- Time keeping
- Ask questions – closed and open-ended
- Find commonalities on which agreement can be built
- Use techniques to prevent difficulties
- Use intervention techniques when there are difficulties
- To close: summarize major points, decisions and next steps
- Celebrate!

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Following-through

- Send draft meeting minutes: summarize discussion, identify decisions and next steps
- Check in

Selected Techniques to Prevent Difficulties

- Regularly ask for agreement and understanding from group
- Ask open-ended questions
- Make suggestions for how to proceed
- Share stories
- Confirm that there is no right answer
- Accept that disagreements are healthy in discussion and reaching decisions

Selected Intervention Techniques when Difficulties Occur

- Return questions to the group (don't take responsibility for answering everything)
- Ask what's happening
- Bring back to the subject at hand when there are distractions
- With side issues: accept/legitimize/deal with or defer
- Use humor
- Use body language
- Use conflict in productive ways

Includes concepts from Interaction Associates and EFP participants