

Guide to Preparing for a Difficult Conversation

Successfully navigating a difficult conversation with a donor or fundholder takes advance preparation. The set of questions and self-reflections below can help you center yourself and anticipate challenges and opportunities. They're drawn from the presentation by philanthropic advisor Stephanie Ellis-Smith and other expert resources. Not all questions may be relevant to you or the situation.

1. Begin with Yourself

What is the ideal outcome of the conversation and why does that matter to me? (Remember that you're not trying 'win' and that 'letting things be' may be the best outcome). Where can I embrace mutual purpose?

What triggers or stories about myself will I need to watch for that might not be beneficial to the conversation?

- My self-identity (competency, worthiness, acceptance, etc.)
- My feelings (what's ok or not ok to express in this situation, what will cause 'fight or flight')
- My beliefs (about the truth, my intentions)

What am I comfortable disclosing about my perceptions, interpretations, and values about the conversation and issue? (Reminder: self-disclosure is important to truth and trust).

2. Consider the Other Person

What stories about themselves might be driving their thinking or position?

- Their self-identity (competency, worthiness, acceptance, etc.)
- Their feelings (what's ok or not ok to express in this situation, what will cause 'fight or flight')
- Their beliefs (about the truth, their positive intentions)

What *role* are they expecting from me in this situation? (Order taker? Customer pleaser? Expert? Advisor within boundaries? True accountability partner or coach?)

3. Prepare for the Conversation

What can I do to make the setting more welcoming? To ensure the other person knows their interests are understood and respected, even if we disagree with each other's perspectives?

How will I center myself before and during the conversation? What will help the other person feel centered or more open before we discuss a difficult topic?

4. During the Conversation

Can I remember to use active listening skills and to seek first to understand?

- Shift from *certainty* (I am right, they are wrong) to *curiosity* (How do they see the world so their view makes sense?)
- *Affirming* that I'm hearing and understanding their values and perspectives? Maybe even affirm shared values and perspectives (e.g., 'here's where we're all in this together')?
- Paraphrasing
- Using 'yes, and...' phrases
- Using 'I' statements rather than 'you' statements

What *broader context* about the issue, or which institutional or systemic challenges, might they be most open to hearing and reflecting on? What contrasting information might mesh with their self-identity, feelings, or beliefs?

Is there an opportunity to *counter* their viewpoint safely and respectfully by providing that new context? (There might not be this time, or maybe ever.)

If things go off track, am I prepared to be responsible for getting the conversation back on track by returning to active listening techniques?

If I hear a shift in mindset or willingness to listen to a new perspective, what concrete step can I offer for us to take together to:

- *Transform* their philanthropy?
- *Transform* our relationship?

5. Wrapping Up

What opportunities for future engagement can I offer and confirm? (e.g., an article, site visit, meeting with a creative innovator or inspiring changemaker, dialogue with a trusted peer donor or leader)

How will I thank the person for the difficult conversation, for the trust built?