Facilitation

Tools of the Trade for Grantmakers

Facilitation can and should be a key component of any grantmaker’s toolbox. According to Exponent Philanthropy members, a well-facilitated meeting:

• Sticks to an agenda
• Progresses smoothly
• Gets results
• Draws folks out
• Engages participants well
• Dissipates tense situations
• Increases participants’ buy-in
• Creates a space in which participants feel valued and important

The ability to confidently and competently facilitate a meeting or conversation is critical. From board meetings to conversations with grantees to gatherings with fellow funders, facilitating a good meeting can mean the difference between productivity and frustration.

In this resource, we’ll equip you with action items, tips, and reminders to improve your facilitation. Great facilitators are made, not born, and good planning can take you far.
Action Items

**Design a good meeting.** First, plan, plan, plan! The time you invest on the front end will serve you well along the way. A good rule of thumb is to commit twice as much time to planning the meeting than the meeting actually takes. So, yes, that means 2 hours of planning for a 1-hour meeting or 2 days of planning (at least!) for a 1-day retreat.

Create for yourself a working document that outlines the following points:

- **Purpose**—Why are you coming together? For information sharing? Decision making? Product creation? Relationship building? Many meetings will include several components, so be sure to identify your priorities and the components that will consume the bulk of your time.

- **Intended outcomes**—Begin with the end in mind. By the end of the conversation, where do you want to be? By the end of the conversation, what do you want to accomplish? Take time to articulate the answers.

- **Stakeholders**—Given your intended outcomes, who needs to be at the table? Perhaps you’re planning a board meeting, so your trustees are a given. But what about outsiders? Do you also need your financial advisor or CPA on hand? A subject expert or a grantee?

- **Time**—Let your meetings be purpose-driven, not time-driven. That’s not to say you shouldn’t facilitate tight meetings with clear time frames. Rather, first think through your desired outcomes, stakeholders, and what you need to accomplish most—and focus your time there. Also be realistic about what you can and should accomplish in a given meeting. For most foundation leaders, the foundation is a long-term enterprise; there will always be a next meeting.

- **Decision-making process**—Be clear beforehand how you will make decisions. Boards may simply follow a process outlined in their founding documents, but other groups will need direction. Make the decision-making process explicit, and be sure that everyone in the group understands the process.

*Note:* Coming to consensus can be the hardest part of a group process, but prework to understand the dynamics at play can help you facilitate decisions. Consensus is also best achieved in stages: a series of small agreements leading to a significant one. Outside facilitators can often be incredibly helpful.
Create an agenda. After you’ve considered the meeting’s purpose, desired outcomes, stakeholders, time frame, and decision-making process, you’re ready to create a written agenda. Consider the following:

- Which topics to address
- How much time to spend on each topic
- Who facilitates each segment of the agenda
- Details of the physical space and setup

Involve different voices. During the meeting, there are innumerable ways to gather ideas and input from the group. They include:

- Brainstorming
- Individual journaling followed by sharing
- Work in pairs or small groups followed by sharing
- Mind-mapping, or using Post-it® notes to share ideas, then grouping ideas by theme

As the facilitator, part of your job is to engage everyone. Recognizing when it may be hard for someone to participate is important—for example, due to power dynamics or family history at play. Although you can’t necessarily remedy underlying issues, being conscious of them can inherently help to ease tensions.

Manage conflict. Facilitating meetings naturally involves conflict from time to time. Your best tool: planning. The techniques discussed in this tear sheet can help to reduce conflict. You can also work to keep participants on track, bringing them back together with gentleness or firmness or humor, depending on the reason for the derailment. Remind participants of the question on the table, the objectives, and the time frame. Sometimes giving leadership roles to divisive members can help to increase their buy-in. You can also take a break, stretch, breathe, and return refreshed.

Facilitator Tips

In advance of the meeting, check with your stakeholders. Be sure that everyone is familiar with the meetings’ logistics (e.g., time, place, meals) and agenda. If the agenda includes tricky issues, you may also want to have one-on-one conversations with participants in advance to better understand the sticking points and plan appropriately for anticipated dialogue and emotion.

If you’ve ever been blindsided at a meeting, your preparation may have been insufficient. If controversial issues will be discussed, it is important to learn about key stakeholders’ concerns; take time to research any questions, find solutions, and talk a second time; and know roughly where each person stands going into the meeting. After talking with key stakeholders, reassess
if it is the right time to raise a particular issue. If so, as the facilitator, you’ll be able to articulate the concerns, raise possible solutions, and help the group resolve the issue at hand.

As the facilitator, you also set the meeting’s tone. There are many simple things you can do to get off on the right foot and maintain great tone throughout, including the following tips:

• Make eye contact.
• Give everyone your warmth and attention.
• Use humor and laughter as appropriate.
• Make a special point to engage those who are new or possibly less comfortable.
• Listen well. Echoing what you hear is particularly powerful.
• Show respect by sticking to your agenda and time frame. If you realize the meeting is not progressing as planned, ask the group’s permission to make changes along the way.
• Take a break.
• Pause. Don’t rush to fill silence.

Be sure to identify roles at the start of the meeting (e.g., facilitator, timekeeper, note taker). You may also want to set ground rules for the meeting or the group in general.

What Members Are Saying

“The ‘Facilitation: Tools of the Trade’ seminar was the best seminar I have ever taken from Exponent Philanthropy, and its direct application was evident at our next board meeting. Facilitation is all about the prep work before a meeting even begins.”
—Lindsey Stammerjohn, John Gogian Family Foundation, Torrance, CA

Resources

• Board Meetings & Retreats Tips and resources for running efficient, effective meetings. www.exponentphilanthropy.org
• Making the Most of Your Board Meetings Article from Essentials, Exponent Philanthropy’s quarterly publication. www.exponentphilanthropy.org
• Setting an Agenda Is Half the Battle Article from Essentials, Exponent Philanthropy’s quarterly publication. www.exponentphilanthropy.org
• Interaction Institute for Social Change A source for great facilitation training. www.interactioninstitute.org
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