

## Bellagio Center Facilitation Guidance

The Rockefeller Foundation’s Convenings & Networks team is thrilled you have chosen strategic convening as a method for advancing your organization’s work and accelerating its impact. Selecting the right fit facilitator for your Bellagio convening is critical to achieving its purpose. Yet, there’s no one size fits all approach.

### Facilitator Models

The most common facilitator models we encounter are: 1) inviting a subject matter expert (often the convening organizer or a close partner) to take on the additional role of facilitator, or 2) hiring an external professional facilitator. We recommend selecting a facilitator (or multiple facilitators) based on the unique needs of your participants and the dynamics of the convening.

| <b>Benefits of a Subject Matter Expert as Facilitator(s)</b>  | <b>Benefits of an External Professional as Facilitator(s)</b>  |
|---|--|
| <ul style="list-style-type: none"> <li>• Ask subject-specific guiding questions based on historical or landscape knowledge of the issue</li> <li>• Discuss sensitive issues that would benefit from being handled by a respected leader in the space</li> <li>• Leverage existing relationships with others in the room for building trust and surfacing tensions</li> <li>• Respond quickly and intelligently to criticisms or a critical audience</li> <li>• Conduct simultaneous breakout groups focused on technical content</li> <li>• Reduce preparation time if the facilitator has been involved in convening design and production</li> <li>• Reduce additional fees or headcount</li> </ul> | <ul style="list-style-type: none"> <li>• Refocus a group on the big picture and take the discussion “out of the weeds”</li> <li>• Discuss sensitive issues that would benefit from being handled by an entirely neutral individual</li> <li>• Enable neutrality and objectivity in advancing dialogue due to lack of pre-existing alliances or biases</li> <li>• Respond adaptively to draw out diverse voices and balance discussion</li> <li>• Conduct highly productive and focused full group discussions</li> <li>• Dedicate preparation time to facilitation, vs. splitting attention on facilitation, content, and production</li> <li>• Increase expert participation</li> </ul> |

### Recommended Facilitators List

If you choose an external professional facilitator for your convening, you are welcome to hire any qualified facilitator of your choice in accordance with RF procurement guidelines. Should you need recommendations, we invite you to use the following list.

The following consultants are on contract with the Foundation for convening design support. They may also be available to provide facilitation services for an additional fee. Please contact Marlee Margolin for more information.

- [Lauren Yarmuth](#)
- [August Public](#)
- Taylor Buonocore-Guthrie and Mollie Khine at [Conversate](#)
- Fred Dust at [Dust & Co](#)

The following facilitators are experienced in leading conversations to achieve impact. Please feel free to contact them directly to inquire about facilitation support.

- [Nick Petschek](#), advisor at transformation consultancy Kotter (experienced with facilitation at Bellagio)
- [Nik Gowing](#), founder at [Thinking the Unthinkable](#)
- Krizna Gomez and Ishtar Lakhani at [JustLabs](#)
- [Eric Martin](#) at [Adaptive Change Advisors](#)
- [Daniel Stillman](#), coach, speaker, workshop leader, host of The Conversation Factory
- [SecondMuse](#), an impact and innovation consulting firm
- [Priya Parker](#), strategic advisor, author of *The Art of Gathering*

## Facilitation Tips and Techniques

The following content was provided for use by the Rockefeller Foundation by [Caspian Agency](#) and [Dust & Co.](#)

Facilitating a conversation or convening involves careful consideration around the goals and objectives of the convening or conversation and understanding the audience. The facilitator is like the air traffic controller, not the pilot. Whilst pilots are experts at flying planes, air traffic controllers provide direction and confirmation for places to get where they are going as easily and safely as possible.

When a group comes together, people can be going at different speeds and directions. As a facilitator, you do not have to be the expert in the material or to figure out how everyone should contribute. Your job is to establish a trusting environment so each person can do that for themselves.

The following tips and recommendations will help in facilitating a successful and meaningful conversation / convening.

### Bring humanity into the conversation

- *Mechanisms to facilitate:*
  - Start meetings with asking for forgiveness - we might fail
    - We might lose connection
  - Giving voice to values
  - Don't Zoom shame

### Set agreed upon norms upfront

- *Mechanisms to facilitate:*
  - Give permission to 'look away' so everyone can take visual breaks as needed
  - Start with setting the tone, and 'cultural norms' for this conversation, i.e., can we turn off the camera, do we need to answer every question, can we leave the room

### How do you cut people off?

- *Mechanisms to facilitate:*
  - Set principles upfront - 45 second timer
    - Work from the principles of generosity of time and simplicity of thought
  - Insert yourself in some human way and practice at home
    - Ex. Have an inflection within your voice - tone of voice
  - Acknowledge that it can be a really hard thing

### Be a creative listener

- *Mechanisms to facilitate*
  - How much do I put myself in vs. how much do I stand apart?
  - How do I do what Oprah does? She isn't afraid to insert herself, allow facilitator to have themselves in the conversation
  - Restricting the word and tone of 'but'

### How do you frame questions to provoke responses?

- *Mechanisms to facilitate*
  - How and what questions as opposed to getting agreement
  - Ask to fill in the gaps. Who's missing? What's missing? What are we forgetting? What are we not asking?
  - Probe for counterintuitive lessons. Where is there a similar situation in a different sector where this is working? Where it tried and failed?
  - Question assumptions. What are we assuming that is putting this problem in this particular frame? Are there other assumptions we should try out?

### How much should you include in a conversation? - how much do you cover so it is a valuable use of your time but you're not racing through an agenda?

- *Mechanisms to facilitate*
  - If you can't do perfect, do short - 90min max
  - If the conversation is over it's done
  - You can put a timer in your window to know how long you have to respond - 30sec or how long a question should be discussed

### Changing modes in a conversation

- *Mechanisms to facilitate*
  - Reset the rules every time you reset the mode of conversation
  - Each conversation should be based on a different mode
  - Sometimes different types of facilitators are better at different modes (i.e., brainstorming vs. critiquing)

### How do you start and end the call?

- *Mechanisms to facilitate*
  - Start
    - Introductions if it's a small group - no more than 25
      - Name and where you are right now
    - Bios and backgrounds can be sent ahead of time
    - If it is mass audience, you can use the chat box
    - If it's a serious conversation disallow/disable the use of chatbox
    - Start every conversation with a quick 5min conversation in small breakout groups 1:1 to start the flow of conversation

- End
  - Low sensitivity conversation - quick wrap up
  - High sensitivity conversation - wrap as you go
    - Make a point, pause, discuss, and then synthesize
  - Actively listening in the moment for the most powerful thing that was said and use this to wrap the call, even early

#### What do to if something goes wrong

- *Mechanisms to facilitate*
  - Lean on the humanity setting the tone at the beginning of the call, and the agreed principles
  - For tech issues:
    - Have an A, B & C backup plan before going into the call
    - Ensure everyone knows who the main point of contact is if something goes wrong

#### Conflicts and how to deal with them

- *Mechanisms to facilitate*
  - Have a set of prompts you can turn to, to mitigate conflicts
  - Set the tone in advance to get agreement with all parties – i.e., how are ‘we’ going to address problems
  - Reiterate norms at the beginning of the call

#### **Other mechanisms to use based on the above / best practices**

- If you put people into breakout sessions you do not necessarily need to report out those conversations live, you can send asynchronously
- Make a point, pause, discuss, and then synthesize
- Have someone else watch / listen in in a broader way and assist with the flow and logistical mechanisms via text to the host
  - Think of players & fans