



DISCOVER PHASE DOCUMENTER TEMPLATE

File naming convention: [Theme + Date of the session + Facilitator Initials + Notetaker Initials + Group name] e.g., "MELFeb20-NDKP-Apple"

Theme:

Date of the Session:

Facilitator:

Documenter:

Collaborative Group/Subgroup Name:

Length of the Session:

Link to Recording:

List of Participants:

Note: Please upload the recording to the Documenters folder in the shared drive.

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Discussion	Observations/Reflections	Key Decisions/Action Points
Proposed agenda	Who is speaking?	
Introductions	Who is quiet?	
Expectations	Points of agreement	
What is the topic of discussion?	Points of contention	
Transcribe/quote important comments/contributions/questions/clarifications	What issues are parked for further discussion?	
Activities – if Miro is used, provide a link to the board	How were points of contention resolved?	
Link to any working documents – Google Docs/working agreements/presentations	Division of responsibilities/tasks	
Group reporting on an activity	Any tech issues?	
Plan for meeting/working agreements – timing/ frequency/ modality	Did people stay for the entire session? Who did not attend?	
Feedback on session		

Tools and Resources Index

Preparation And Planning Guidelines
Collaboration Grant Parameter
The Collaboration Labs Guidelines: Discover, Define, Refine Phases
Women's Funds Survey to Identify Collaboration Topics
Women's Funds Participation Guidelines
Advisory Committee Review Discussion Guide
Discover Phase: Collaboration Topic Description
Define & Refine Phase: Collaboration Grants Plan
Define & Refine Phase: Collaboration Grants Budget Guidelines
Facilitator And Documenter Guideposts
Facilitator Orientation
Documenter Orientation
Discover Phase Documenter Template
Define Phase Documenter Template
Refine Phase Documenter Template
Discover Phase Reflection Questions
Define Phase Reflection Questions
Refine Phase Reflection Questions
Supporting The Collaborations
Fishbowl Session Example
Reflecting And Learning
Learning Conversation Example

Please visit the Fenomenal Funds website for more tools and resources:

<https://fenomenalfunds.org/grantmaking/collaboration-grants/tools-resources>