



REFINE 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:

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Discussion	Observations/Reflections	Key Decisions/Action Points
<p>Proposed agenda</p> <p>Topics discussed (please break down the discussion based on the proposal outline – these are the broad subheadings for your reference)</p> <ol style="list-style-type: none"> 1. Reflection on the Advisory Committee: Feedback/offering Discussion Disagreements/agreements 2. What changes did the group decide to make? 3. Conversations/discussions on conflict resolution 4. Next steps 5. General feedback <p>Transcribe/quote important comments/contributions/questions/clarifications</p> <p>Activities – if Miro is used, provide a link to the board</p> <p>Link to any working documents – Google Docs working agreements/presentations</p> <p>Group reporting on an activity</p> <p>Plan for meeting/working agreements – timing/frequency/modality</p> <p>Feedback on session</p>	<p>Who is speaking?</p> <p>Who is quiet?</p> <p>Group dynamics</p> <p>Points of agreement</p> <p>Points of contention</p> <p>What issues are parked for further discussion?</p> <p>How were points of contention resolved?</p> <p>Division of responsibilities/tasks</p> <p>Any tech issues?</p> <p>Did people stay for the entire session? Who did not attend?</p> <p>Way forward</p>	

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>