THE COLLABORATION LAB GUIDELINES: DISCOVER, DEFINE, REFINE PHASES

Discover
Connect and explore topics

Define
Articulate what, how, and so what

Refine
Clarify plan based on peer feedback
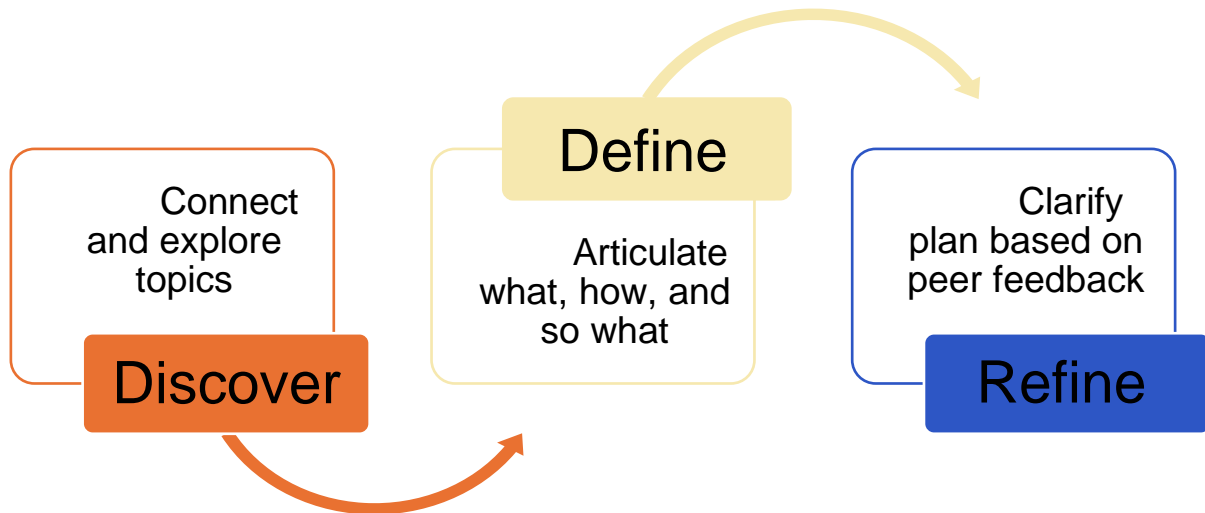
When the Advisory Committee set out to co-create a process for supporting women's funds to work together, they understood that collaboration takes time, requires trust, and needs resources. By sequencing the process into three phases—Discover, Define, and Refine—they envisioned a process to build trust, develop a plan, and focus on what it means to act. The Collaboration Labs created a process for the women's funds to connect, discover, and dream. Through the thoughtful selection of facilitators and documenters, it was also a space to learn, be bold, and be creative about the issues and how to work together.

ASSEMBLING THE TEAM OF FACILITATORS AND DOCUMENTERS

Facilitators and documenters are vital for crafting spaces conducive to collaboration, learning, and transformative change. Their role transcends mere logistics management to significantly shape the collective experience, ensuring it is inclusive, equitable, and aligned with shared values. The thoughtful recruitment, orientation, and engagement of these professionals, who are proficient in their fields and deeply committed to core values, are crucial for ensuring every participant feels heard and valued. This approach cultivates trust and meaningful connections within collaborative groups, establishing the foundation needed to address complex challenges and advance systemic change.

The process of seeking, hiring, and orienting facilitators and documenters for the Collaboration Labs was intentionally designed to reflect the feminist principles of equity, inclusion, and transformational change. This thoughtful preparation and ongoing engagement enabled the facilitation team to spark strategic thinking, foster connections, and inspire meaningful collaborations within the Prospera International Network of Women's Funds.

Guidance

➢ Start the selection process for facilitators by first establishing clear criteria that focus on a thorough knowledge of the relevant issues, fields, or topics, along with the capabilities to foster inclusive and supportive environments for collaboration. Consider the following guiding questions:
  ● What specific skills and experiences are essential for facilitators and documenters in this context?
  ● How do location and language influence diverse representation and meaningful engagement across different regions and thematic areas?
  ● How should the recruitment process adhere to universal compensation standards to fairly recognize the value of labor and expertise while promoting equity?
➢ Once facilitators and documenters are selected, engage them in joint orientation and planning sessions to develop a shared vision and framework for the process. Use this opportunity to address the following:
  ● What are our expectations from this collaboration?
  ● How does each phase of the process contribute to the overarching goals?
➢ Organize regular meetings before, during, and after each phase for all facilitators and documenters. These meetings are essential to ensure alignment, address emerging needs, integrate learning, and foster mutual support and collaboration within the team.
➢ Schedule regular one-on-one meetings with facilitators, documenters, and staff team members to provide timely feedback, troubleshoot issues, and offer customized support to the collaboration groups.

FENOMENAL
FUNDS

Practice

Facilitation and documentation are not just logistical roles; they are integral to shaping the collective experience. Centering feminist principles in these roles means valuing facilitation as a political and relational practice—one that actively fosters trust, accountability, and shared leadership. By prioritizing deep listening, co-learning, and adaptability, facilitators and documenters help create spaces where power can be redistributed, voices amplified, and collaborative strategies strengthened. This deliberate approach in seeking, hiring, and orienting facilitators and documenters for the Collaboration Labs ensures that the facilitation methods transcend mere exchanges; they cultivate lived experiences of equity and transformation in practice.

ENSURING EQUITABLE PARTICIPATION

Language justice, time justice, and accessibility are commitments to radical inclusion. They are about creating spaces where people can communicate authentically and genuinely by reducing barriers to their full participation. They disrupt power dynamics by leveling the platform to ensure everyone can exercise their full participation and authentic self-expression.

The ability to bring together a diverse group of people who speak different languages, have different accessibility needs, and work in various time zones requires intentionality around making the space welcoming to every participant. We worked to make sure that the timing of meetings was reasonable for most, if not all, participants, that everyone could contribute freely in a language they understood and were confident speaking in, and that they had access to all the information.

Initially, we offered translation and simultaneous interpretation in three languages. Over time, we added three more languages. Meetings were scheduled at the times that could best accommodate different time zones. In cases where that was not possible, we worked with facilitators to offer the same session at different times. While we asked the women's funds about accommodations for accessibility, none of the participants needed that support.

Guidance

➢ Identify the language needs of participants.
➢ Ask them, and others in their contacts to recommend interpreters they have worked with, with a priority on interpreters who understand the technical language of the collaboration topic.
➢ Build a broad pool of interpreters so that you have a number to draw upon during times of high demand. Schedule sessions in advance to ensure the availability of interpreters.
➢ Ask participants and the facilitation team for feedback on the interpreters.
➢ Translate documents into the languages offered.
➢ When scheduling online sessions, be mindful of the people at the extreme ends of the time zones. Work on finding the most accommodating time to ensure they are included.
➢ Accessibility often requires specialized knowledge. Ask participants about accessibility needs. Partner with organizations that have expertise to provide appropriate accommodations.

Practice

At the heart of language justice is the principle that all languages must be valued, honored, and heard by facilitating conversation among people who do not speak the same language. Rather than privileging one language over others, language justice respects the diversity of languages. In doing so, we reimagine the exercise of power through language. The approach of centering equity as the core of justice is also applied to time and accessibility. We move toward justice by lowering barriers that privilege any language, time, or ability over another.

FENOMENAL FUNDS

DISCOVER PHASE

The challenge of securing resources positions organizations in competition with each other often. This crowds out opportunities to share their common challenges and work together to co-create solutions. Overcoming that competitive stance requires intention, and if you can confirm that all collaboration groups will receive funding will remove a major barrier to collaboration. A facilitation team that understands this community and works intentionally to create a space for connection is essential. Allocating time for connection and bringing different people in different roles also opens up new possibilities.

In the Discover Phase, the facilitation teams held open spaces for connecting and exploring. These open spaces supported the women's fund participants in getting to know each other by inviting contributions from diverse geographical regions, scopes, and scales. Fenomenal Funds organized the sessions based on themes that surfaced from a survey of the women's funds and an analysis of the Resilience Grants. The women's funds could sample any number of themes as they explored what was most relevant for them in the current moment. Coming out of this phase, the women's funds had to commit to a topic and identify their collaborators. This proved to be a challenge because many of the topics felt relevant and timely, leading to a request for participation in two Collaboration Groups.

Guidance

➢ Use a survey to ask the participants what they are interested in exploring. Analyze their responses and group them into themes. Use those themes to set up an initial schedule.
➢ Orient the participants so they can understand the intention for the space and the offerings. During this initial orientation, share the timeline of the Collaboration Lab process, highlighting a few key milestones while remaining open to adjustments in the timeline as needed.
➢ Introduce the facilitators to build confidence in the process.
➢ Share a clear schedule to make it possible for everyone to participate.
➢ Give participants the freedom to choose the number of topics they will explore during the Discover Phase.
➢ Encourage participants to develop an internal process to decide which space they will prioritize because many of the topics may be relevant and offer opportunities to address ongoing concerns.
➢ Once groups have selected a focus, have the facilitators engage them to articulate their chosen focus and share the reasons behind their selection.
➢ Share the written plan with the grant review committee to ensure that all groups focus on the topics defined by the funding parameters, while also obtaining questions and offerings[1] from the committee. This collaborative feedback should be shared with the collaboration groups for consideration, ensuring alignment and responsiveness to diverse insights and expectations.

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[1] The term "offerings" is intentionally used instead of "suggestions" or "recommendations" to reflect the non-hierarchical relationship between the Advisory Committee and the participants in this process.

Practice

Understand what the needs and priorities of the participants are. Create the right framework to support the process of discovery. Remain responsive to emerging needs. Adapt as the process unfolds, and trust it. Not everything will be perfect, but if you create a space that responds to the needs of the participating organizations, they will respond with great enthusiasm.

DEFINE PHASE

Entering a collaboration with other organizations based on a clear plan detailing how the collective wants to work together enables the group to succeed. When roles and responsibilities, decision-making, resource management, and conflict resolution are clearly defined, the group has the tools in place to work through the typical challenges that arise when organizations work together.

The Define Phase supported the women's funds to dig deeper into their topic of focus and decide what they wanted to co-create and how they would do it. The overall guidance was for each group to define their road map for the collaboration: What specifically would they focus on? How would the work be done? And what did success look like for the collective? The facilitation team held the process, space, and responsibility for giving back to the women's funds what they were hearing, while also challenging them about what was possible. They also pulled together the group's plan based on the discussion.

Guidance

➢ Define an overall template for the plan. Engage the facilitation team to understand its components and consider approaches to defining them.
➢ Task the facilitation team with the responsibility to document, synthesize, and reflect back to the group what they are hearing, so that it can inform the collaboration plan.
➢ Share information with the group about what the peer reviewers of their plans will be looking for in the review process.
➢ Bring in graphic illustrators so that the visual representation also supports the group's reflection on their road map and adjust it accordingly.
➢ Encourage the group to not only think about what they will focus on and how they will engage but support them to also think about the small details, such as how they will make decisions, how they will resolve conflict, and what support they will need to do the work.
➢ Be ready for questions. Remain open to adapting some components.
➢ Set a clear timeline for the process, and allow for the differences among the groups in pace, approach, and style.
➢ Check in with the facilitators regularly. Reflect and learn from what they share.

Practice

Set up the Collaboration Group for success by investing the time and resources in supporting them to plan for what they want to do; it will make all the difference. The process must pay attention to the essentials: strong connections and relationships, a plan and openness to adapt as things change, agreed-upon arrangements of how to share power and responsibility, and clarity in how the work is facilitated, how decisions are made, and how leadership for the whole is exercised.

7

REFINE PHASE

The benefit of a peer review process is that it offers insights and reflections from a place of constructive support. It also draws from the knowledge of the ecosystem—who else has engaged with the topic, and how might they be a valuable resource for some of the issues that might arise? Knowing and trusting that the offerings come from an intention to support opens up receptivity. In the end, the benefit is not just for the group that is receiving the offering but the broader community, which will also get to learn. Even more important is the self-determination that allows each group to decide if, when, and how to use those offerings.

At the end of the Define Phase, the Advisory Committee reviewed the 13 collaboration plans submitted by the women's funds. The Advisory Committee shared their reflections, based on individual reviews and collective discussions, as offerings to the women's funds. Each group decided how and if they would engage the offering from the Advisory Committee. Some used the Refine Phase to reflect on the offerings and make adjustments to their plan based on the feedback. Others used the time to plan for the implementation phase, while others decided that they needed the space for other demands and would pick up the next stage when they received their grants. What was clear was that the groups valued the work that the Advisory Committee had put into reviewing the proposals and offering their insights.

Guidance

➢ Create clear guidance for the Advisory Committee's review of the plans.
➢ Facilitate a process to discuss the observations, insights, and offerings.
➢ Synthesize their feedback and share it with the groups.
➢ Give the opportunity to the Collaboration Groups to consider the offerings and how they want to respond to them.
➢ Synthesize lessons and insights from the process.

Practice

Giving each group the autonomy to decide *if and when* they would engage the offerings from the Advisory Committee respects and honors their self-determination, as well as wisdom.

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