

AGB Forum Speaker Guidelines

Thank you for joining us as a session facilitator for the Foundation Leadership Forum.

What sets the Forum apart from many other conferences is that the audience includes both staff professionals of colleges, universities, and foundations and volunteer board members who may have limited expertise in some of the topics addressed and limited experience with other affiliated foundations. We ask our facilitators to be sensitive to the different roles and varying degrees of expertise/experience with college and university foundations, endowment management, higher education advancement, and governance represented among attendees. Rather than present as you would to professional peers, we encourage you to actively engage the room and facilitate a memorable learning experience, adapted to participant interests and taking advantage of the diverse expertise and experience of audience members. We also encourage you to identify specific learning objectives in advance and reserve a few minutes at the end of the session to review key takeaways and insights.

To help you plan effectively, this document offers an overview of:

- Learning objectives for all sessions
- Event participants
- Helpful tips to facilitate active learning

For more discussion of these points, or for feedback as you develop your session materials, please connect with AGB at foundations@AGB.org.

Once again, thank you for agreeing to provide this essential service to the field.

Objectives for the Participant Experience

Experiences of participants in any AGB learning session can be described in the following ways.

Learning is:

- Made relevant through clear connections to important challenges and/or opportunities affecting colleges, universities, and/or the impact of their work.
- Enhanced through participants' collective wisdom, not just the facilitator's.

- Made accessible through facilitators' openness and responsiveness to participants' questions and their nimbleness in serving the needs of participants with diverse levels of existing knowledge.
- Made memorable and actionable through succinct materials, energetic facilitation and participation, and a bold approach to addressing thorny and consequential issues.

PowerPoints

Use of PowerPoint slides is optional and will depend on your session type. For those sessions in which slides are materially beneficial, please keep in mind the following guidelines:

- AGB can provide you with a PowerPoint template to use if you wish. You are also welcome to use the template of your institution.
- Please minimize the amount of text on each slide and the number of slides in your deck. We recommend a minimum font size of 16 point.
- Slides are best used to illustrate key concepts and/or share data using charts, diagrams, and images.
- No session may be used to overtly promote products or services for sale. In every case, experts who have a sales interest should demonstrate the value of their insights in lieu of advertisement.

Active Learning Techniques

The following activities, among others, have been shown to enhance learning and retention. Depending on your session type, these suggestions could enhance attendee experience.

Agenda Setting and Clear Takeaways

Many sessions benefit from a short introduction of what you hope participants will come to understand or become better able to do as a result of the session, and how your time together will be spent accordingly. In addition, a short closing comment to firm up key takeaways is often helpful.

One-Minute Reflections/Respond-React-Reply

Provide a prompt such as a targeted question, written passage/text, or argument. Each participant takes one minute to write down a response. Then, have each person share their response with one or more people nearby. (If time is short, facilitators can instead select a few responses to share with the group.)

Think-Pair-Share

Participants turn to someone near them to summarize learning, to answer a question posed, or to consider how and why and when they might apply a concept.

Pyramiding/Snowball

Given a problem, participants first work alone, then in pairs, and finally in foursomes and compare, refine, and revise their conclusions/recommendations.

Case Study

Provide participants a real-world case for analysis and discussion (e.g., a news article, account of a decision or procedure, video, etc.). In one or more groups, ask participants to analyze the case (potentially using specific guidelines or questions). Then have participants present their analysis to the class or require groups to turn in written answers. Leverage participant analysis to facilitate discussion. Crystallize takeaways.

Role Playing/Fishbowl

Simulate a real-life situation that requires problem-solving skills. If time is short, consider asking a few volunteers to come to the front of the room to role play while their peers observe. Ask observers and role players alike to reflect on what happened. (Perhaps provide key questions at the outset.)

Forced Choice

Pose a series of questions one at a time. For each question, provide a selection of two to four imperfect or extreme stances or responses, and ask that each participant choose one. Give them 30 seconds to move to the part of the room that indicates their choice. Then, use facilitated discussion about participants' choices to enable insights and takeaways.

Dots

Post butcher paper around the room annotated with diverse choices in response to a prompt. Give each participant one or more stickers to attach beneath the response(s) they find most compelling. Discuss the results as a group.

The Silent Question

Participants respond to the prompt "A question I still have about this topic but have been afraid to ask is..." The instructor then addresses questions if time permits or commits to post-session follow-up.

Crowdsourcing/Word Salad

Using butcher paper, pose a key question and write down a list of responses. (Requiring single-word responses can sometimes be helpful, too.) Pause, engage, and clarify to make sure you get things “right.” When the list feels full enough, discuss and find a way to account for each response.

The Socratic Method

Rather than delivering answers, pose questions. Help participants to refine their thinking iteratively together with peers. Adopt, emphasize, and/or reframe what emerges to crystallize takeaways. And don't forget to add your own insights, including what the group may have missed.