Quick Reference Guide to Facilitating

Planning the Meeting	Opening the Meeting	Conducting the Meeting	Closing the Meeting	Post Meeting Actions
❑ Define the meeting scope, assess the needs of the group, and identify the meeting objectives.[1] ❑ Develop an agenda with detailed process notes identifying the scheduled activities that will occur during the meeting.[2] ❑ Identify participants to invite.[3] ❑ Research the topic as thoroughly as possible. ❑ Write the introduction, choose structured discussion tools, & identify how decisions will be made.[3] ❑ Finalize meeting logistics and the final agenda to be distributed, ensuring that participants have access to any relevant information before or during the workshop.[4] ❑ Identify all needed materials and supplies; Print all materials and handouts; Prepare important flip-chart sheets and other meeting tools. ❑ Be the first to arrive at the location; Post the agenda; Test the equipment; and set up the room based on the number of participants.	❑ Once all of the members are in attendance, say "Hello and welcome" and introduce yourself. ❑ Explain why you are there. ❑ Explain the reason why everyone is there. ❑ Explain and clarify the group’s objective and goal. ❑ Explain why and how each member was chosen. ❑ Go over and clarify the ground rules for the meeting. ❑ Open the floor to the members to have them introduce themselves.	❑ Maintain neutrality. ❑ Apply the appropriate group processes. ❑ Ensure balanced participation. ❑ Use appropriate verbal and non-verbal skills. ❑ Manage conflicts/disagreement. ❑ Help the group transition from one agenda item to the next. ❑ Reference or guide participants to written documentation when used. ❑ Periodically check-in to: o Ensure objectives are being met. o Determine what participants are thinking or feeling. o Determine if individual and/or collective needs are being met. ❑ Challenge the group when necessary ❑ Call audible/make adjustments as needed. ❑ Continuously check your own biases and baggage. ❑ Respect the group’s knowledge, experiences, expertise, and challenges. ❑ Help the group acknowledge their strengths and successes. ❑ Assist the group in owning their challenges/barriers to success. ❑ Record/document agreements, disagreements, action items, parking lot items.	❑ Review the agenda. ❑ Confirm the objectives of the meeting have been met. ❑ Ask if there are any outstanding items that need to be discussed. ❑ Confirm action items, roles, responsibilities and due dates. ❑ Confirm who will send meeting notes and when they will be sent to the participants. ❑ Conduct a formal or informal evaluation of the session. ❑ Schedule the next meeting. ❑ Thank participants for attending the meeting.	❑ Ensure all minutes are completed and published for participants, including action items within 3 - 4 days. ❑ Follow up with participants to ensure that action items are being completed. ❑ Debrief the meeting with participants to determine how the process and management of the project/meeting can improve. ❑ Publish the results of the debrief before the next meeting. ❑ Discuss any problems that came up with colleagues and determine ways improvements can be made. ❑ Give recognition to timely progress.

Created by: Khalid Asad, Shaunda Evans, Erik Kast, Terri Kern, Kristi Newburg

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Facilitating Tips & Tricks

Planning the Meeting

- The industry standard for facilitators is one day of preparation for each day of facilitation.
- When setting the agenda, put the most important items near the start of the meeting. This ensures those topics are discussed while energy is still high.
- When choosing a venue for the meeting, make sure that it is accessible and comfortable for the participants and that it has adequate facilities.
- For a large number of attendees, a large room with modular furniture works best.
- Last but not least, don't forget to prepare yourself both mentally and physically for your upcoming meeting!

Opening the Meeting

- It's a good idea to have the group members start off by stating who they are, where they work, and one thing that they love to do.
- To give each member a sense of ownership have them vote to approve or disapprove the ground rules.

Conducting the Meeting

- Apply appropriate group processes (e.g., individual activities, small groups, brainstorming, etc.).
- Make adjustments as necessary (i.e., be comfortable with deviating from the agenda when things aren't working or the group goes in another direction that is productive or necessary).
- Assign roles to group members to encourage process ownership (e.g., time-keeper, monitoring ground rules, scribing, etc.).
- Take breaks appropriate to the scheduled meeting time.
- Acknowledge individual input- it encourages participation and lets members feel they are contributing.

Closing the Meeting

- Before thanking the participants for attending, ask them to give you one thing they will take away from the meeting. This will leave them with a feeling that you have a genuine interest in them and how they were impacted by the meeting.

Post Meeting Actions

- Ensure that minutes are produced and promptly distributed to all attendees including guests.
- Meeting minutes don't need to include everything everyone said!
- All meeting documents including the agenda, minutes and supporting documents should be kept together and archived.
- Often people need a gentle nudge to remind them about completing action items. Don't be afraid to do so.
- Don't forget to reflect on the meeting and the team's accomplishments and hopes, such as "What are some hopes you have about the next phase of implementation?" or "What part of today's "check" was most helpful to you?".

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