

Tips for Facilitating a Meeting

Before the Meeting Starts

1. Work with the leader/planner to clarify the meeting's purpose and develop an agenda.
2. Determine if a note taker(s) are necessary for transcribing meeting notes and/or recording items on flipcharts.
3. Along with the leader, prepare discussion questions to accomplish Objectives—anticipate issues and questions that may arise.
4. Make copies of agenda, verify room (i.e., adequate seating, room temperature, necessary resources are present like computer, PowerPoint, conference phone, microphone, etc.)

During the Meeting

1. Introduce yourself, your role (know your role and own it), and the group's role(s) and responsibilities. Make participants feel welcome and invited as “experts.”
2. Guide the discussion by asking open-ended and clarifying questions.
3. When necessary, use a “parking lot” to record unrelated items, or important items to discuss at a later time.
4. Know the start and end time, closely follow the agenda's timeline (use time management); but, at the same time, be flexible when absolutely necessary.
5. Encourage equal participation of discussion and meeting flow & focus through redirection, verbal and non-verbal communication, and good pacing.
6. Before concluding the meeting, review Objectives, recap discussion and decisions, and reiterate Action Items and responsibilities.
7. Conclude the meeting and thank participants; end on a positive and forward-looking note.

Following the Meeting

1. Meet with the leader to holistically evaluate the meeting and record lessons learned.
 - Evaluate the *content* (the “what”). This includes the topics discussed and the outcomes, decisions, and results.
 - Evaluate the *process* (the “how”). This covers things like the meeting structure (agenda) and the interpersonal dynamics and interaction between staff.
2. Verify if follow-up is needed on your behalf.

Free tip: Get through any agenda item by using a three-pronged approach: (1) Ensure everyone has the necessary information for decision-making; (2) Allow time for debate and discussion (build *time* into agenda) while knowing when to redirect, and (3) Sense when the group is ready to move towards a decision (i.e., several are talking of implementation, there's lots of agreement nodding, a clear proposal has surfaced, and people are repeating themselves).