

# Facilitator's Check List



## Before a meeting

- Work with the meeting leader to determine the purpose and desired outcomes of the meeting from meeting leader and participant perspectives
- Asses the content of the meeting
- Identify stakeholders (think outside the box)
- Determine how decisions will be made and who will make them
- Identify any constraints and potential problems
- Outline meeting roles (facilitator, recorder, meeting leader, meeting organizer, presenters, decision makers, participants)
- Draft an agenda and identify any related materials to be sent in conjunction for meeting preparation
- Decide and secure meeting date, time and location
- Will you need food/drinks? Flip charts & pens? Internet connection? Name tags?
- Send meeting announcement, agenda and related materials in advance. Confirm that the desired outcomes meet participant expectations
- Does the meeting need to be advertised through external media?
- Draw up a sign-in sheet and meeting evaluation
- Arrive early to set up, arrange tables and chairs, post signs, etc.

## During a meeting

- Start on time
- Point out location of restrooms, parking constraints, and other general housekeeping items
- Review agenda, objectives and any process measures
- Get agreement on ground rules
- Clarify decision making methods and identify constraints
- Encourage participation and active listening
- Record agreements big and small
- Check in periodically on the mental/physical health of participants. Do we need a break?
- Summarize periodically what has occurred and check if any clarification is needed
- Ask open-ended questions
- Keep the meeting safe and free from personal attacks
- Use a 'bike rack' or "parking lot" for comments and issues not directly related to the main topic(s). Ask the group how they would like to proceed on those issues
- Summarize next steps and evaluate the meeting (+/-)
- Thank participants for coming

## After the meeting:

- Summarize the meeting evaluations and collect feedback from meeting leader, recorder, etc.
- Post notes, agreements and action items
- Make sure unresolved issues get addressed
- Identify **who** is doing **what** by **when**
- Follow through on action items
- Celebrate accomplishments
- Learn from the evaluations on how to do a better job next time