SOCIAL SCIENCE TOOLS FOR COASTAL PROGRAMS

Introduction to Planning and Facilitating Effective Meetings

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About This Publication

Introduction to Planning and Facilitating Effective Meetings is the sixth in a series of guides developed to bring information to coastal managers about the use of social science tools in their field of work.

The guidebook was developed by staff members from the National Oceanic and Atmospheric Administration (NOAA) Special Projects Division and Coastal Services Center (now known as the Office for Coastal Management), both within NOAA's National Ocean Service. Contents were derived from many resources, including the training manual for a NOAA Coastal Services Center course, Public Issues and Conflict Management, and the works of Ingrid Bens, author of *Facilitating with Ease!*

For additional information about social science guidebooks, please visit *www.coast.noaa.gov/digitalcoast/publications.*

About NOAA

The National Oceanic and Atmospheric Administration is a federal agency that enriches life through science. In NOAA's quest to keep citizens informed about the changing environment around them, the reach of this organization extends from the surface of the sun to the depths of the ocean floor.

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Introduction

For many organizations, meetings are a way of life. Clearly, making these meetings as productive as possible goes a long way toward increasing organizational productivity. This guidebook provides the basic techniques used by professionals for meeting planning and facilitation, and while facilitation is as much an art as a science, familiarity with these concepts can help even novice facilitators plan and bring about more effective meetings.

Many types of meetings can benefit from having a facilitator present. Some of the more common include strategic planning or visioning, brainstorming, stakeholder input, project evaluation, staff retreats, policy development or review, project design, and prioritization of goals and actions.

A common misconception is that good results will occur simply by getting all the experts together in the same room. Getting the right people together is certainly important, but that's just a first step. A facilitator supports the meeting process by keeping the group on track to produce the desired objectives.

The Role of a Facilitator

A facilitator is someone who uses knowledge of group processes to design and deliver the structure needed for effective meetings. Facilitators can be individuals from outside the group or organization, or an internal team member or meeting leader. Helping plan the agenda is a key function of this role. Facilitators help the group members decide where they want to go, but the group itself deliberates and makes the final decisions.

At the meeting, a facilitator acts as a "content-neutral" person who leads the group through the agenda—but does not contribute to the substance of the discussion and has no decision-making authority.

Facilitator functions:

- Helps group define its meeting purpose and desired objectives for a meeting
- Designs processes for group to meet its goals, create products, or make decisions
- Guides group discussions to keep meeting participants on track by asking key questions and reminding groups of their stated goals
- Ensures that group assumptions are stated and tested, and that all participants' voices are heard
- Acts as a "neutral party" that has no stake in the outcome of a meeting
- Takes notes to record key points of conversation and group decisions
- Helps group plan to carry out decisions made at a meeting

Facilitator beliefs:

- A group of informed individuals, working together, can accomplish more than one person working alone.
- Everyone's opinion is of equal value, regardless of rank or position.
- People are more committed to ideas and plans that they have helped to create.
- Participants will act responsibly in assuming accountability for their decisions.
- The process—if designed well and sincerely applied—can be trusted to achieve results.

Key facilitator characteristics:

- Neutrality on the issue being discussed or decided upon
- No decision-making authority
- Acceptable to all members of the group
- Some knowledge of the issues being discussed so facilitator can follow the conversation and keep it on track
- Trust in the group to make the right decisions for itself
- Ability to synthesize and organize ideas quickly

Planning a Productive Meeting or Workshop

The following steps for planning a productive meeting do not necessarily have to be done in the order listed. In fact, facilitators often work through a few steps simultaneously, with one exception: defining the meeting purpose and desired objectives always comes first.

1. Define the meeting purpose and objectives
2. Create the participant list
3. Establish roles
4. Develop the agenda
5. Identify background materials
6. Plan the meeting space

1. Define the Meeting Purpose and Objectives

The first step should always be to ask, “Why are we having this meeting?” Typical reasons include planning or visioning, decision-making, team building, problem solving, evaluating or tracking a program or process, and information sharing.

Objectives are the expected, concrete outputs of a meeting. Objectives should be specific and measurable, such as a tangible product or a potentially measurable increase in knowledge or understanding on a specific subject. A tangible product might be a strategic plan or a funding priority list.

If the desired objective is an increase in knowledge or understanding, it is important for the desired objective to shed light on why this is needed. The desired objective should therefore include a "so that" statement. For example, "Increased understanding of customer needs is necessary so that new decision-support tools can be developed to address climate change impacts."

2. Create the Participant List

For a meeting to be truly successful, the right people need to participate. During the planning phase, organizers should think about the people needed to finalize decisions and commitments.

If the meeting requires that a decision be made, then the decision makers should be present. Meeting size is also important, since more than 20 participants can be difficult to manage if consensus is needed. If some people in the room are attending to observe, not participate, then their roles should be made clear to everyone before the meeting begins.

3. Establish Roles

It is important to determine the roles people will play at the meeting. Roles can shift during a meeting, but assigning roles in advance will lead to a more organized and productive experience for all.

The following are common roles for a typical facilitated meeting.

Facilitator

The facilitator is the one who contributes structure and process to interactions so groups are able to function effectively. The facilitator moves the meeting along and keeps it focused. Ideally, a facilitator is neutral toward the outcome of the meeting. When complete neutrality is needed, or when dealing with contentious issues, the group will benefit by using a facilitator from outside the office or organization. Using a professional facilitator is strongly encouraged when the meeting will have 40 or more participants.

Breakout Group Facilitator

Breakout group facilitators guide the small discussion groups within a meeting. For the people acting in this role, having some facilitation training or experience is helpful.

Meeting Leader

This is typically the person who convenes the meeting and serves as the "team captain," providing direction on the purpose and desired objectives of the meeting. Meeting leaders are often content experts for the issues being discussed.

Facilitative Leaders

While the use of a facilitator from outside the group is ideal for many situations, groups do not always have the resources to hire one. In these instances a group member or the meeting leader will serve as a facilitative leader. When serving in this dual role, the facilitative leader may or may not be neutral on the issue at hand but can still provide the effective facilitation practices needed.

Meeting Planner

A meeting planner organizes the logistics of the meeting, which involves contracting with the meeting location, arranging for catering, purchasing supplies, and so forth. While there is often overlap between this role and that of the meeting leader or facilitator, it can be extremely helpful, especially for larger meetings of 50 or more people, to designate a meeting planner.

Recorder

The recorder documents the process, deliberations, decisions, actions taken (or to be taken), and outcomes of a meeting, with varying degrees of detail as needed. The facilitator can also act as the recorder by writing main points of the discussion on a flip chart. For taking more detailed notes, however, it is necessary to have a separate person in the recorder role. A multi-day meeting or a meeting involving breakout groups can use many recorders.

Participants

The participants provide input, discussion, and feedback on the topics provided on the agenda. Participants can also provide feedback on the meeting design after the meeting has concluded.

4. Develop the Agenda

The agenda provides the focusing framework for the meeting, puts tasks in a logical order and timeframe, and offers an outline for writing the summary report at the meeting's conclusion.

In the hands of a skilled facilitator, an agenda should be considered a guideline, not a law. Flexibility is essential to ensure that topics are resolved or tasks accomplished in the best manner possible. Facilitators should anticipate which items could be postponed and be prepared to table them until a more appropriate time.

There are typically two versions of an agenda. The participant agenda is the concise version participants receive before a meeting. At a minimum, the participant agenda includes the meeting title, location, start and end times, objectives, discussion topics, and information about how and when attendees will participate. The participant agenda is a clear and streamlined version of the detailed process agenda.

The process agenda has the additional information the facilitator and meeting leaders need to ensure that the meeting runs smoothly. Putting together the detailed process agenda helps the meeting leaders think through the details of the entire session. (Appendix A contains a template for a process agenda.)

The letters "OPQRST" provide an easy way to remember the six components of a process agenda:

Order of the facilitation processes (the agenda) and specific **O**bjective for each
Process techniques used to gather information throughout each process
(e.g., listing, brainstorming, grouping, prioritizing, sticky-dot voting, etc.)
Question (starting question) and the explanation given to initiate each
facilitated process
Recording method used to document the information as it is received during each
process (e.g., three-column matrix)
Supplies needed to perform each process (e.g., Post-it notes, dots)
Timing and estimated duration for each process

Table 1: Questions to Consider When Designing an Agenda

Purpose and Desired Objectives	• What is the primary purpose of this meeting? Can the meeting purpose be posed as a single phrase or sentence that will guide meeting planning? • What are the desired objectives? What will the participants walk out of this meeting with (products or knowledge)? • What decisions, if any, will be made at this meeting? • How much can the group realistically expect to accomplish in the time allotted?
Participants and Roles	• Who are the group members (both the individuals and the organizations they represent)? • What are the backgrounds of the individuals and organizations? What are the interpersonal dynamics? Do they know each other well? • Who will serve as the meeting leader? • Is the facilitator neutral and perceived as such? How important is neutrality? Are there any objectives or motivations that need to be addressed up front? • Will there be other people helping (other leaders, facilitators, recorders, etc.)? • Will the appropriate people be present to finalize decisions or ensure that commitments can be made and the decisions carried out?
Logistics	• Where will the meeting be held? • Who is the contact person for facility and logistical arrangements? • Is this the most appropriate location? (Consider “territory” issues, convenience, comfort, accessibility.) • What kind of space, furniture, wall space (if needed for posters or flip chart notes), lighting, and audiovisual equipment does the site have? • What are the starting and ending times? Are there adequate breaks in the agenda? • Have arrangements been made for food and beverages? • Is any additional equipment needed (audiovisual, displays, computers, etc.)?

5. Identify Background Materials

Background materials should provide participants with the information needed to meaningfully participate in the meeting. Ideally, participants should receive this information at least one week in advance.

Materials to include in a meeting background package:

- The participant agenda
- List of participants
- Any relevant information participants should read before the meeting—including topical information on issues that will be discussed

It is also a good practice to let participants know if materials will be available at the meeting or if they should bring their own copies of the digital materials that were provided before the meeting.

6. Plan the Meeting Space

An important part of meeting dynamics is the meeting environment. A convenient location for all participants is a plus. A neutral location should be considered for contentious discussions. If participants are traveling, send hotel information well in advance so everyone can stay in the same place.

How the room is set up should depend on how the content will be delivered and what type of interaction is expected between participants. Different setups will allow for different types of learning and participation. Common room setup options include the following.

Conference Style

Participants are seated on four sides of a table. This style is often used for small committee meetings or similar meetings of this type, where interaction between participants is anticipated and expected.

Hollow Square

Tables are arranged in a square in which the center is open. Chairs are placed around the perimeter of the square. This setup is used for larger committee-type meetings where interaction among participants is important.

U-Shape

Rectangular tables are positioned to form a "U," with chairs placed around the outside. This setup is used for committee meetings as well, but is particularly helpful when using audiovisual equipment so that all participants can see a presentation when a screen is placed at the open part of the U.

Theater Style

Rows of chairs are placed next to each other facing the front of the room. A speaker or presenter is at the front of the room. This style maximizes the available seating and works well when the audience needs to take minimal notes and when participant interaction will be minimal.

Classroom Style

Rows of tables face the front of the room with two to four chairs at each. This setup is appropriate when there is a presentation at the front of the room and participants are expected to take notes. There usually will be some dialogue between the presenter and the audience. Participation between audience members will be limited.

Round Tables

Eight to ten chairs are arranged around small round tables. This style can be used for small breakout groups. Participants can converse with each other easily.

Executing a Productive Meeting

Setting Expectations

Setting realistic expectations of what will be achieved is an important part of meeting planning and facilitation. If the agenda is overly ambitious, participants may feel let down if all the objectives are not met, even when substantial progress has been made. Conversely, participants may be caught off guard if more input is needed from them than originally anticipated. Articulating meeting expectations and participant roles is important both before and during the meeting.

The meeting leader or facilitator also should explain how the input gathered at the meeting will be used and what the next steps in the process will be (e.g., a draft report will go out for review, actions identified at the meeting will be completed, etc.). Participants should know if the decisions they reach will be final or if their input will be viewed as a recommendation for someone else to use.

Meeting leaders should give participants clear expectations about what is being covered at the meeting. There may be topics that participants would like to discuss that are not appropriate for the meeting or that will be discussed at a future meeting. The facilitator and meeting leader should make this clear before the meeting and reiterate the point, when appropriate, by reviewing the meeting agenda and objectives.

Managing Time

Time limits are an essential part of well-run meetings. Although time limits can create anxiety, most participants will appreciate starting and ending on time more than they will resent the pressure of time limits.

The first step is to map out time limitations for each activity on the agenda. Make sure each activity is given a specific amount of time that is adequate to address the issue. Practice activities before the meeting to test the time assumptions, and, using this information, establish time limits for speakers, discussion, and less structured activities. Consider appointing a timekeeper and giving that person authority to stop people, with ample warning (e.g., a "two-minute sign" or other signal), when their time is up. Having a visible clock in the room is also helpful.

Here again, the need to be flexible is paramount. The facilitator or meeting leader must know what agenda items can be put off to another meeting, decided quickly, or delegated to a participant or subcommittee to decide. Facilitators must be ready to tweak the agenda during the meeting, as needed, with the ultimate goal of accomplishing meeting objectives while letting everyone leave on time.

Establishing Ground Rules

Setting ground rules is important. While most ground rules reiterate common sense, it is still beneficial to draw attention to them at the beginning of a meeting. After presenting the ground rules, the facilitator may ask, "Does anyone disagree with sticking to these ground rules during our meeting?" If no one has any objections, the ground rules can be referred to if there are problematic interactions during the workshop, such as people interrupting each other or not coming back from breaks on time.

Some of the more common ground rules are listed below.

- Don't make or receive phone calls or use any personal electronics during the meeting; set phones to silent or vibrate.
- Start and end sessions on time.
- Commit to being back from breaks on time.
- Everyone participates.
- All participants are considered equal.
- Only one person talks at a time—don't interrupt.
- Raise your hand to speak (if group has more than six participants).
- Listen to ideas without judging.
- Clean up after yourself.
- Groups can decide on their own ground rules at the beginning of a meeting if needed.

Process Tools for Making Decisions

Professional facilitators draw from a library of tools to aid groups in making decisions collaboratively. The following are a few of the most commonly used and easiest to implement.

Consensus Decision-Making

While the stated objective of many meetings is to reach consensus, participants need to know how high a degree of consensus is needed. In a perfect world, all group members would leave the meeting with a high degree of satisfaction with the decisions made at the meeting, a perfect consensus. While this is sometimes possible, resource and time constraints and strong opinions make perfect consensus difficult to achieve. It is important to think strategically about the degree of consensus needed.

In many instances a "comfortable consensus" is enough. This term refers to final agreements that all participants can at least live with and group members will not try to actively derail. On the other hand, issues that affect group members personally, or that group members have passionate feelings about, may need a high degree of consensus to get everyone on board with the group decision.

Facilitators have to be flexible with the level of consensus that is possible. When no degree of consensus is forthcoming at a time when a decision has to be made, the facilitator can default to majority voting. The easiest way to do this is by a simple show of hands.

Consultation

When holding a public meeting or dealing with diverse groups of stakeholders or parties that have already agreed to disagree on some issues, the meeting objective might be to come up with a list of suggested recommendations. Facilitating a conversation between such groups can help them better understand each other's viewpoints and interests and may open up the possibility of consensus-based decision-making in the future.

Prioritization

Sometimes the desired objective of a meeting is to assign a priority level to a list of needs, options, or solutions for the decision makers. An excellent technique for determining which of the components are most important to a group is "sticky-dot voting."

In sticky-dot voting, a list of items is provided. Participants are given a number of small dots with an adhesive backing and told to place the dots next to the ideas they like the best. Specific selection criteria can be used to guide this exercise. Participants can be given the option of placing all their dots next to one item, or they may be directed to distribute them among the items. The facilitator tallies up the number of dots next to each item to determine the overall priorities of the group.

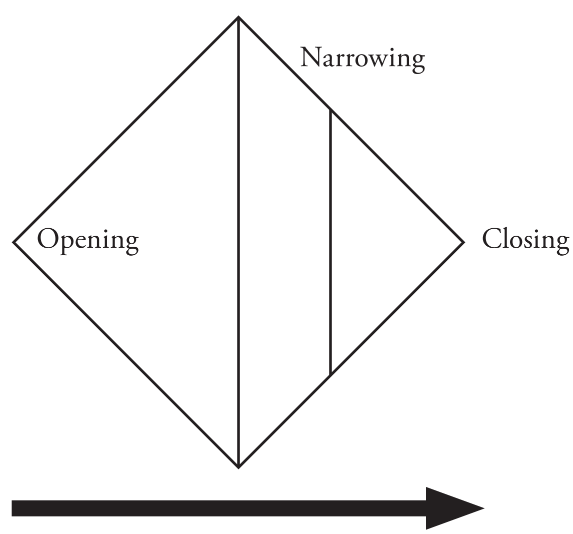
Theories of Group Interaction

The following concepts are helpful models for facilitators and meeting leaders. The models enhance insight into group interactions and will help to design the agenda and facilitate discussion.

Stages of a Discussion

Meetings can be viewed as a series of discussions with three phases.

1. Opening – where multiple ideas are generated and clarified, or information is gathered. This phase includes brainstorming, general discussion, and question and answer sessions.
2. Narrowing – where the information gathered is organized by eliminating duplicate ideas, combining similar ideas, or evaluating options.
3. Closing – where decisions are made, priorities are selected, or agreement is reached.



Viewing discussions in this way helps facilitators keep the group focused on specific tasks. For example, during the opening phase of a discussion, a facilitator will encourage participants not to evaluate any ideas but just to generate as many ideas as possible.

During the closing phase of a discussion, it can be useful for the group to use specific criteria for deciding on a preferred solution or prioritizing options. For example, if the organization is trying to decide on the best projects to take on over the next year, the criteria for prioritizing may be that the project (a) be feasible given current resources and (b) advance the mission of the organization.

Positions versus Interests

Facilitators need to be adept at knowing the difference between positions and interests. When a group is having trouble agreeing on a solution to a problem, it is often because participants are focused on their positions instead of their interests or values.

A "position" is an opinion about how a problem should be solved or how a group should go about accomplishing an objective. An "interest" is an underlying value or area of importance for an individual or group. Focusing on interests instead of positions increases the chance of forming consensus within a group. An example of a position might be that "the development should be allowed." The underlying interest, however, is concern about jobs, tax revenue, and community quality of life.

When a group comes to an impasse, a facilitator can attempt to guide the discussion down to the level of underlying interests and values by asking probing questions such as "Why do you think this is the best solution?" and "What makes you feel so strongly about this issue?" Focusing on interests instead of positions can be useful when working with groups with a high degree of conflict. Additional resources about managing conflict are listed in Appendix D.

Facilitation Techniques

The following techniques are used by facilitators during meetings to assist groups in accomplishing their objectives.

Table 2: Facilitation Techniques

Technique	Description
Breakout Groups	Some groups can be too large to enable in-depth discussion. For example, in a one-hour discussion session involving 100 people, many participants would not be able to share their thoughts. Depending on the nature of the issue, the facilitator may decide to break a large group into smaller groups of 5 to 20 participants. These groups usually "report" back to the larger group to share the results of their discussion or any decisions made.
Active Listening	The facilitator should look people in the eye, use attentive body language, and make participants understand that they are being heard. Body language should neither show support for or disapproval of any suggestions, comments, or ideas, since this can discourage open communication. The facilitator should face and take a step toward the person who is speaking to show interest.
Asking Questions	Questions test assumptions, invite participation, gather information, and probe for hidden points. The facilitator can ask open-ended questions to encourage thorough discussion of all ideas presented.
Paraphrasing	Paraphrasing involves repeating what has been said to let participants know they are being heard, to let others hear the point a second time, and to clarify key ideas. This also provides an opportunity to ascertain if the facilitator has correctly "heard" or interpreted what was said.
Summarizing	After listening attentively to all that has been said, a facilitator should offer a concise and timely summary. Summarizing is a good way to revive a discussion, or to end one when things seem to be wrapping up.
Synthesizing	While it may sometimes be appropriate to record individual ideas of each participant, in other situations the facilitator may encourage attendees to comment on and build on each other's ideas and then record the "collective idea" on a flip chart. This builds consensus and commitment.

Table 2: Facilitation Techniques *(continued)*

Negative Polling	It is sometimes easier to reveal disagreement within a group than to confirm agreement. Often used during the "closing" part of a discussion, the negative poll is a way to find out if the group is ready to confirm a decision and move on to the next task. When using this tool, the facilitator can ask the group if anyone disagrees with what has been suggested or put forth by participants. If no one speaks up, it is usually safe to move on. If any individual has hesitation, he or she will usually speak up in a negative poll.
Boomeranging	Participants will often look to the facilitator to answer questions about content or suggest solutions. However, the facilitator is the process expert, not the content expert, and must resist the temptation to solve content problems for the group. Instead, the facilitator can "boomerang" the question back to the group by asking the following questions: • "*What do YOU think the groups should do?*" • "*What does the GROUP feel is the best choice?*" • "*How would YOU suggest solving this problem?*"
Restating the Purpose	When a discussion gets off track and participants are talking about issues that are not on the agenda, the facilitator can ask the group to pause and reconsider the meeting purpose or desired objectives. The facilitator may say, "*I sense this issue is important to the group, but the purpose of our meeting today is ___________, so would it be okay to table this discussion until a later time?*"
3-Step Intervention to Deal with Disruptive Behaviors	The facilitator can use this intervention when a person's behavior is disruptive to the meeting. Step 1 – Describe problematic behaviors. For example, "Allen and Sue, both of you have left and returned three times during the meeting." Step 2 – Make an impact statement to tell group members how their actions are affecting the facilitator, the process, or other people. For example, "We had to stop our discussion and start over on three occasions because of this." Step 3 – Redirect the person's behavior. This can be done by asking members for their suggestions about what to do. For example, "What can we do to make sure this doesn't happen again?" or "Would everyone like a short break so that when we return everyone will be able to fully participate?"

Labeling Sidetracks	The facilitator should let the group know when it gets off track. The group can decide if it wants to pursue the sidetrack or get back to the agenda.
Parking Lot	The facilitator can use a flip chart page, or ask the recorder to keep a sheet, labeled "Parking Lot." Sidetrack items are placed in the parking lot and reviewed later to determine if any should be included in a future agenda. Questions and concerns recorded in the parking lot need to be followed up—either by the facilitator or (more often) by the meeting leader.
Mirroring	The facilitator can periodically tell group members how they appear so they can interpret their actions and make corrections. This is particularly effective for drawing the entire group's attention back to the tasks at hand or dealing with disruptive behaviors. This is also a good way to see if the pace is too slow, too fast, or if the group needs a break. *"I see some confused faces out there. Do we need to clarify the process? Or perhaps take a break?"*
Remaining Neutral	The facilitator must focus on the "process" role and avoid the temptation to offer an opinion on the topic under discussion. A facilitator who becomes involved in the content discussion must let the group know that he or she is stepping out of the facilitator role.
Flip Chart Note Taking	Taking flip chart notes not only serves the purpose of recording decisions, priorities, and key points of discussion, but also focuses the group's attention and ensures that all participants are in agreement with what is being recorded. Some tips for utilizing flip chart notes effectively: 1. Ask participants to report whether their points are being captured accurately. 2. Write large enough for everyone in the room to be able to read; do not use flip chart notes in a large group where many participants would be unable to see the chart. 3. Consider using alternating marker colors for each main point to improve readability. 4. Label each page with the session it is from and a page number to make it easier to type up the notes later.

Facilitating Teleconferences, Videoconferences, and Webinars

There are special considerations for facilitating meetings where one or all group members are participating via phone, video, or the Web. Below are some of the techniques used for virtual meetings.

Before the meeting:

- Make any special arrangements for the delivery of background information and all meeting materials.
- Make sure that all participants have directions for how to gain access to the meeting, including conference call code, directions for joining the webinar, and so on.

During the meeting:

- Conduct a roll call to establish that people are engaged and ready to proceed, and to let everyone know who is participating.
- Keep a list of participant names in front of the facilitator. As the meeting progresses, the facilitator should make a check mark beside people's names every time they speak to keep track of who is on the line and help identify the people who need to be brought into the conversation.
- Ask participants to identify themselves before they speak.
- Ask participants to mute their phones when they are not speaking to minimize interference on the line.
- Periodically check in with participants who are not physically in the room, because in-room participants may not be able to pick up on important nonverbal cues.

Meeting Evaluation

Collecting information from meeting participants on how well they thought the meeting went can be used to make future meetings more productive. An evaluation form, such as the one provided in Appendix B, is a common way to get this feedback.

Another tactic is to spend a few minutes at the end of the meeting asking participants what went well and what could be changed or improved. The facilitator then records the responses on two different sheets of flip chart paper, or on one sheet with two columns for the aforementioned questions. Some facilitators call this a "Plus/Delta Exercise." Asking the group to answer these questions in a round-robin format is also a productive approach.

Meeting Follow-Up

Meeting follow-up starts before the meeting begins. During the planning stage, the meeting leader, facilitator, and planning team should discuss what type of meeting follow-up will be done and who is responsible. This will help guide the recorders at the meeting in knowing what information should be captured, to what level of detail, and in what format.

A short meeting summary document should be drafted within two weeks of the meeting, if possible. The summary should contain, at a minimum, the action items and next steps, including due dates and responsible parties. More formal summary reports can include background information, main points of discussion, and answers to questions asked by participants. Participants should know what type of meeting summary will be compiled and if they will be asked to review such a document before it is final.

Conclusion

Knowing how to plan and facilitate an effective meeting is a highly valuable skill. There is a growing need for increased facilitation skills as decision processes become more collaborative and input is needed from many perspectives.

While no written materials can replace formal facilitation training, this primer provides the basic concepts and techniques. Using the material put forth in this publication will help people new to this process design and conduct effective meetings and group interactions.

Appendix A: Process Agenda Template

Title of Event

Date

Location

Meeting Start and End Times

Meeting Purpose and Objectives:

- Describe the primary purpose of this meeting
- Describe the meeting objectives
- Describe the decisions to be made

Participants: List of participants
Meeting Leader: name(s) of meeting leader
Facilitator: name(s) of facilitator and breakout group facilitator

Time	Topic, objectives, and activities	Setup and materials
Clock time here **Names of people responsible here** **Meeting leader, facilitator, time keeper, recorders**	**1. Name of activity** **Objective:** What you would like to accomplish for this session **Activities/Interactions:** List of specific activities using process techniques and recording methods with times attributed to each step Total time = __ minutes	Room setup Equipment, materials, supplies needed
Time **Names of people responsible here**	**2. Name of activity** **Objectives:** What you would like to accomplish for this session **Activities/Interactions:** List of specific activities using process techniques and recording methods with times attributed to each step Total time = __ minutes	Equipment, materials, supplies needed

Time	**Break – also include activities needed to prep for next session**	**Food, beverages**
Time **Names of people responsible here**	**3. Name of activity** **Objectives:** What you would like to accomplish for this session **Activities/Interactions:** List of specific activities using process techniques and recording methods with times attributed to each step Total time = __ minutes	Equipment, materials, supplies needed
Time	**Lunch – also include activities needed to prep for next session**	**Food, beverages**
Time **Names of people responsible here**	**4. Name of activity** **Objectives:** What you would like to accomplish for this session **Activities/Interactions:** List of specific activities using process techniques and recording methods with times attributed to each step Total time = __ minutes	Equipment, materials, supplies needed
Time **Names of people responsible here**	**5. Name of activity** **Objectives:** What you would like to accomplish for this session **Activities/Interactions:** List of specific activities using process techniques and recording methods with times attributed to each step Total time = __ minutes	Equipment, materials, supplies needed
Time	**Adjourn**	

Appendix B: Meeting Evaluation Template

Workshop Title
Date
Location

Thank you for attending the ______________ Workshop. We are interested in your feedback about this workshop. Please take a moment to give us your opinion on this evaluation form.

PLEASE COMPLETE BOTH SIDES OF THIS PAGE.

Please indicate the strength of your agreement with each statement below:

	Strongly Disagree	Disagree	Not Sure	Agree	Strongly Agree
The workshop was a valuable use of my time.	☐	☐	☐	☐	☐
The purpose of the workshop was clear.	☐	☐	☐	☐	☐
The workshop was the right length of time.	☐	☐	☐	☐	☐
If you disagreed with the above question, was the (meeting) length…….?	☐ Too Long			☐ Too short	
I feel that my contributions to the discussions will be utilized by leadership.	☐	☐	☐	☐	☐
The format of the workshop was effective for achieving the stated objectives.	☐	☐	☐	☐	☐

Please rate each of the following aspects of the workshop:					
	Very Poor	**Poor**	**Average**	**Good**	**Excellent**
The workshop location	☐	☐	☐	☐	☐
The workshop facilitation	☐	☐	☐	☐	☐
The workshop materials	☐	☐	☐	☐	☐

What did you like most about this workshop?

What did you like least about this workshop?

Other comments:

Appendix C: Best and Worst Facilitation Practices

Some of the BEST things facilitators can do:

- Carefully assess the needs of the members.
- Create an open and trusting atmosphere.
- Help people understand why they are there.
- View yourself as a servant of the group's needs.
- Make meeting participants the center of attention.
- Speak in simple and direct language.
- Work hard to stay neutral.
- Display energy and appropriate levels of assertiveness.
- Treat all participants as equals.
- Stay flexible and ready to change direction if necessary.
- Make notes that reflect what participants mean.
- Listen intently to understand completely what is being said.
- Know how to use a wide range of discussion tools.
- Make sure every session ends with clear steps for the next meeting.
- Ensure that participants feel ownership for what has been achieved.
- End on a positive and optimistic note.

Some of the WORST things a facilitator can do:

- Remain oblivious to what the group thinks or needs.
- Never check group concerns.
- Not listen carefully to what is being said.
- Lose track of key ideas.
- Take poor flip chart notes or change the meaning of what is said.
- Try to be the center of attention.
- Get defensive.
- Get into personality battles.
- Put down people.
- Unassertively manage conflict.
- Let a few people or the leader dominate.
- Never check how the meeting is going.
- Be overly passive on process.
- Push ahead on an irrelevant agenda item.
- Have no alternative approaches.
- Let discussions get badly sidetracked.
- Let discussion ramble without proper closure.
- Not know when to stop.
- Be insensitive to cultural diversity issues.
- Use inappropriate humor.

From Ingrid Bens, 2005, *Facilitating with Ease!* 2nd Edition. Jossey-Bass, San Francisco, California.

Appendix D: Additional Resources

Facilitation Training

Interaction Associates
www.interactionassociates.com

Institute of Cultural Affairs in the U.S.A.
www.ica-usa.org/index.php

International Association for Public Participation
www.iap2.org

International Association of Facilitators
www.iaf-world.org

Facilitation Resources

Bens, Ingrid. 2005. *Advanced Facilitation Strategies: Tools and Techniques to Master Difficult Situations.* Jossey-Bass. San Francisco, CA.

Bens, Ingrid. 2005. *Facilitating with Ease! Core Skills for Facilitators, Team Leaders and Members, Managers, Consultants, and Trainers.* 2nd Edition. Jossey-Bass. San Francisco, CA.

Kaner, Sam, Lenny Lind, Catherine Toldi, Sarah Fisk, and Duane Berger. 2007. The *Facilitator's Guide to Participatory Decision-Making*. 2nd Edition. Jossey-Bass. San Francisco, CA.

Schuman, Sandy (editor). 2005. *The IAF Handbook of Group Facilitation: Best Practices from the Leading Organization in Facilitation.* Jossey-Bass. San Francisco, CA.

Schwartz, Roger, Anne Davidson, Peg Carlson, and Sue McKinney. 2005. *The Skilled Facilitator Fieldbook: Tips, Tools, and Tested Methods for Consultants, Facilitators, Managers, Trainers, and Coaches.* Jossey-Bass. San Francisco, CA.

Conflict Management Resources

Association for Conflict Resolution
www.acrnet.org

Association for Conflict Resolution, Environment and Public Policy Section
www.acrepp.org

Fisher, Roger, William Ury, and Bruce Patton (editor). 1991. *Getting to Yes: Negotiating Agreement without Giving In.* 2nd Edition. Penguin Group. New York, NY.

Ury, William. 1991. *Getting Past No: Negotiating with Difficult People.* Bantam Books. New York, NY.

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