# What to Consider for a Successful Facilitated Meeting

## Thirty Considerations in Planning the Meeting

1. Justification for the meeting
2. Desired outcomes
3. Who will facilitate and the role of the facilitator
4. Process to be used
5. Role of leadership
6. Group composition
7. Number and role of participants
8. Policy on telephone / on-line participation
9. Policy on participant use of laptops, tablets, cell phones in the meeting
10. Policy on proxies (if meeting involves decision making)
11. Policy on contributed reports from non-attendees
12. Method for decision making (if meeting involves decision making)
13. Need for use of formal governing rules (e.g. Robert's Rules of Order)
14. Determination of what will be shared with participants after the meeting
15. Assessment of need for confidentiality
16. Policy re: observers and third parties
17. Number of sessions and session length
18. Location
19. Specific date(s) and time(s)
20. Room set-up
21. Where specific participants will be seated (if relevant)
22. Accommodation of break outs (if needed)
23. Methods for capturing discussion, feedback and decisions
24. Method for dealing with off-point input (e.g. a "parking lot")
25. Need for whiteboards, flipcharts, Power Point, video, etc.
26. Need for wifi or wired Internet access
27. Establishment of recorder (before or during meeting)
28. Agenda
29. Provision of breaks
30. Provision of water, other refreshments, snacks and/or food

## Five Considerations in Setting the Stage for the Meeting

1. Announcement to participants (with endorsement by leadership, if needed)
2. Announcement of meeting to wider organization or public (if needed / appropriate)
3. Provision of pre-meeting materials (reports, etc.) to participants
4. Pre-meeting input needed from and homework to be done by participants
5. Reminders
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Eight considerations in preparing for the meeting

1. Creating and formatting exhibits and presentations
2. Reproduction of printed materials
3. Assuring proper room set-up
4. A/V, computer, Internet connection set-up and testing
5. Provision of back-ups (spare laptop, presentation on other media, etc.)
6. Provision of meeting materials (not yet distributed and spare sets)
7. Provision of planned water, other refreshments, snacks and/or food
8. Greeting and seating participants

Eighteen considerations in facilitating the meeting

1. Call to order, establishment of quorum and/or taking the roll (if needed)
2. Reference to the agenda
3. Introductions
4. Housekeeping (e.g. cell phone policy, bathroom location, wifi access, etc.)
5. Endorsement by leadership (if needed)
6. Icebreaker and/or trust-building exercise (if needed)
7. Agreement on confidentiality (if needed)
8. Consensus (or wide acceptance) on desired outcome
9. Recognition of accountability of participants
10. Process and exercises to reach desired outcome
11. Management of time allotted
12. Assurance of full and wide input
13. Conflict management (if needed)
14. Formal decision making (if needed)
15. Development of and accountability for action steps
16. Review of results
17. Establishment of time for next meeting (if needed)
18. Formal adjournment (if needed)

Six considerations in following up on the meeting

1. Thank you and follow-up with participants
2. Meeting evaluation by participants and leadership (as needed)
3. Participant access to results
4. Creation and provision of a report on the results
5. Publicizing the results (if appropriate)
6. Monitoring follow-through and taking corrective action (as needed)