

# How to Facilitate an Effective Meeting

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## ***STEPS FOR DESIGNING AGENDAS***

### **BEFORE the meeting...**

1. Clarify the purpose of the meeting.
2. Articulate the desired outcomes of the meeting. (List these at the top of your agenda.)
  - What does the group you are working with/facilitating want to know and/or be able to do at the end of the meeting?
3. Determine how much time you have for the meeting.
4. Design an agenda that will move the group to the desired outcomes within the given time.

## ***STEPS FOR SETTING-UP MEETINGS***

### ***At the BEGINNING of the meeting...***

1. Clarify the purpose and desired outcomes of the meeting for the group.
  - “The purpose of today’s meeting is to...”
  - “During this meeting we will.....”
  - “By the end of this meeting we will....”
2. Check for understanding and consensus (How to Use Consensus Handout) on purposes and outcomes.
3. Review the agenda with the group.
4. Set or review group norms.
5. Agree on team member roles: **facilitator, process observer, notetaker, timekeeper.**
6. Set times for agenda items, if necessary.
7. Agree on whether notes will be taken on chart paper, laptop etc.
8. Create an “Issues Bin”.
9. Generally, the facilitator begins the meeting.

## ***THINGS TO THINK ABOUT IF YOU ARE THE FACILITATOR***

### **DURING the meeting...**

1. Listen carefully to what people are saying. Use active listening skills.
2. Summarize periodically.
3. Ask questions to broaden and/or deepen conversations as necessary.  
(See Suggested Prompts)
4. Check for understanding. This includes assisting group members to clarify their points and checking to be sure there is shared understanding among group members as to what is being discussed and what agreements are being made.

**Example:** “Pat, are you suggesting that we use our tutorial period to teach higher order literacy skills?”

**Example:** “Ann Marie just proposed an amendment to our decision, is everyone clear on the change she is proposing?”

5. Be sure agreements and action items are recorded so you can revisit them as needed. (See Action Plan Tool)
  - What is the action to be taken?
  - Who will do it?
  - By when?
  - What support will they need to carry out the action?
6. **REMEMBER**, being the facilitator does not mean you have all the answers! If questions arise, put them back out to the group.

***\*\*If more than one person is talking at the same time...***

1. Remind the group of its agreed upon norms.

**Example:** “I hear lot of people talking at once. We agreed to limit side conversations.”

2. Take an “order”

**Example:** “After Rhonda, we will go to Dan, Sara, George, Linda, and then Pete.”

**Benefit:** People know they will have the opportunity to speak and can concentrate on listening to what their colleagues are saying.

**Trade-off:** This strategy can limit meaningful “back and forth” dialogue. If this process is stifling dialogue, you may decide to “break” the order to allow dialogue to occur. In this case, acknowledge to the group what you are doing and why.

3. Make eye contact with those who wish to speak so that they know you see them.

***\*\*If the group gets off track...***

1. Name what is happening.

**Example:** “We have moved off of our agreed upon agenda. Do we want to continue this discussion or return to our agenda?”

2. Acknowledge that the issue that has been raised is an important one, but remind people of the agreed upon purpose of the meeting.

**Example:** “The issue of attendance is an important one for us to discuss. We agreed that the purpose of THIS meeting was to articulate our standards in Lit/Writing I. Does the group want to renegotiate our time so we can have a discussion about attendance now, or should we table it for a later meeting?”

If the group decides to table to issue, be sure to include it in the “Issues Bin” so that it can be included in an upcoming meeting agenda.

***\*\*If the group decides to take up an issue that was not on the original agenda...***

1. Clarify the trade-offs and renegotiate your time.

**Example:** “If we decide to spend 30 minutes talking about attendance, that leaves only 20 more minutes to discuss standards. Can everyone live with that compromise?”

**At the END of the meeting, be sure to:**

1. Review issues in the “issue bin” and make agreements about when issues will be discussed (to be included in the Action Plan).
2. Review and check for consensus on agreements.
3. Hear from the process observer.
4. Debrief the meeting. Decide on a process that gives each person the opportunity to share their reflections on the meeting--what went well and what they would like to improve about how the group worked together.

**Example:** Use a “whip”. Moving in order around the table each person briefly shares their reflections on the meeting. (Individual reflections may have a time limit connected to them.)

**Example:** Put forward a specific prompt or question for the group to respond to in either a “whip” or “popcorn” (individual group members share their response/reflection as they feel moved to do so, in no particular order).

5. Remind people of the next meeting time and place.