

Meeting Facilitation Basics

Project Delivery Academy 11/2004

1) PLANNING THE MEETING

Planning is extremely important to ensure an effective, efficient meeting. Do you know anyone who has the time or desire to be in more meetings? The ability to accomplish more work with fewer meetings lies in the quality of planning engaged in prior to the meeting. A lack of planning is the primary cause of ineffective, inefficient meetings.

Agenda items

- Topics – make a list of the items that need to be covered
- Desired Outcomes - for each topic, determine what needs to be accomplished:
 - information sharing (present new information)
 - status brief/updates (provide updates on prior information)
 - brainstorming (generate new ideas)
 - decision making (discussion options/ideas; recommend action; reach consensus on decision)
- Timing – estimate how much time is needed for each item. This is the most challenging part of planning. Be sure to allow plenty of time for discussion of “hot topics” (know your audience) but don’t allow so much time that the group gets unfocused.
- Players – based on the agenda items, determine who needs to be at the meeting.

Logistics

- Equipment – will you need a projector/laptop, flipcharts, white board, etc.?
- Room size – how large is the group? Can the room be set up for roundtable discussion?
- Availability – what is available on the date you wish? Are the key players available?
- Location – where is the best location to meet? Consider the following:
 - Political climate – do you need a neutral location?
 - Convenience for participants – how many need to travel?
 - Facilities/equipment available
- Facilitation needs – do you need an external facilitator? If you have a “hot topic” on the agenda where heavy debate is expected and you are too invested in the outcome, you may wish to consider finding a neutral party to facilitate the meeting so you can fully participate. Meeting leaders can hold a great deal of influence – it can quickly become very difficult to act as facilitator/meeting leader while trying to weigh in on an issue.

Communication

- create a written agenda – this help document the meeting and gives you a roadmap to follow during the meeting.
- send the agenda in advance to participants (at least 1 - 2 weeks); this allows participants to be prepared for the meeting (gather information, put together a presentation, seek input from others they may represent, think about the issues constructively, etc.). Catching participants “cold” at meetings is the number one cause of having to hold subsequent meetings because the participants weren’t fully prepared to discuss and issue.
- Schedule the meeting using outlook for internals.

2) CONDUCTING THE MEETING

The following information is provided to help your meeting run as smooth and effectively as possible.

- Ground Rules – ground rules help provide a framework of understanding and agreement between meeting participants about what is and isn’t acceptable. They also help the meeting leader better facilitate by preventing certain unacceptable behaviors from occurring and providing a tool to refer back to when they do occur. Tips for ground rules:
 - Set them at the first meeting through a brainstorming process (record on flipchart) – ensure everyone participates and that there is consensus on them; the group needs to own the ground rules
 - Develop a team agreement based on the ground rules – give to each member
 - Bring the ground rules written on a flipchart or poster to each meeting
 - Review ground rules at the beginning of each meeting; add or revise rules as needed – they can evolve if needed
 - See “Facilitation Tips” Handout for samples
- Review agenda at the start of the meeting – check for clarity of the group on what will be discussed and what the desired outcomes are; this helps set the context and tone for the meeting
- Timekeeper – Select another participant to keep track of time to help the meeting stay focused and on track
- Brainstorming – see “Facilitation Tips” Handout for rules of brainstorming
 - Clarify/review the rules of brainstorming with the group
 - Capture ideas on flipcharts
 - Summarize the ideas produced and let the group know what will be done with the ideas/input

- Parking lot – use this to capture items outside of the scope of the meeting and/or items not completed; flipcharts and whiteboards work well for this
- Deal with difficult behaviors – see “Managing Difficult Behaviors of Group Members” Handout

3) CLOSING THE MEETING/MEETING FOLLOW-UP

Closing the meeting can be just as important as the preparation prior to the meeting. If decisions/action items are not captured and documented, issues can occur – items are missed, misunderstandings occur which can create more issues, people’s memories fail when there is no documentation, etc. A lack of meeting closure is the second primary cause of ineffective, inefficient meetings.

- Assign action items
 - What – clarify what is expected
 - Who – identify who is responsible
 - When – determine when it is due
- Summarize decisions made – check again for clarity; reach consensus on the consensus!
- Determine next meeting – set date/time for next meeting if appropriate
- Review parking lot – did anything get missed? The parking lot will help set the agenda for the next meeting
- Send meeting notes – document, document, document
 - Add summary points to agenda items
 - Identify action items and due dates
 - List next meeting and carry-over items for next agenda
 - Send to all participants no more than 1 week after meeting
 - See “Sample Agenda & Meeting Documentation” Handout