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When assuming the role of a meeting facilitator there are key characteristics that help lead to success for this effort. Recommendations are listed below for both review and consideration as you begin to enhance your skills in this area:

1. **Meeting agenda** - Assume responsibility for the meeting agenda (written), including all items whether they are actionable or not. Determine how far in advance items will be accepted for inclusion on a given agenda and the method for collection, what categories are used to navigate all issues and how much time each item will be given for information exchange, review, discussion, and action. Distribute in a consistent fashion to all attendees including background information. Identify the items where 'action' will be taken and prior review of the included items is mandatory because decisions will be reached during the scheduled meeting time.
2. **Room location/set-up** – Clarify 'who' schedules the room/complete this if included in your assignment as meeting facilitator as far ahead as possible to avoid restricted seating. Determine the set-up that is most conducive to robust and healthy conversations, (i.e., U shaped table setup, classroom seating for larger groups, multi-screen viewing for ppt support, no tables and a smaller setting for conflict resolution or small group debriefing).
3. **Determine meeting note taker prior to the start of the meeting** - determine the skill level of the note taker and the method by which this information will be disseminated post meeting. [Do not take this additional role on if you are facilitating the meeting.]
4. **Analyze the dynamics of the group process** - create and maintain a safe environment; have the ability to deal with disruptive behaviors (i.e., ground rules established before the use of rotating facilitators in which all attendees agree to have only one person speak at a time, all attendees agree to practice active listening and move through items in the priority listed on the agenda. Ground rules are agreed to and often committed to in writing prior to initiating a meeting series.)
5. **Demonstrate the capability to be issue neutral** – as a facilitator, you will not take sides or bring persuasive arguments to any dimension of the discussion. You may present facts that are germane to the topic, but allow others to fully develop persuasive arguments around these facts.
6. **Monitor all time commitments** – practice acute awareness on two levels of the event as it happens, awareness of the content (*discussion* items) and process (*how* the group functions). Start the meeting on time and end on time. Strive to end *early* when practical. Move each item on the agenda within the timeframe listed; items can be carried over until the next meeting when needed and clearly communicate this at the start of each meeting.
7. **Consider timeframes and frequency of meetings** – why are all meetings that you facilitate set on the schedule as they are listed – in other words, what is accomplished by daily, weekly, bi-weekly and monthly recurring events? Is it simply past practice or is there a connection to current deliverables that requires the schedule that is in place?
8. **Continuously evaluate the results of the meeting process** – was there closure for all parties as needed and expected; was there discomfort and lack of trust as the result of any specific meeting?
9. **Personal Skill Sets for Facilitators:**

- a. Blend assertiveness, tact, discipline and humor with your commitment to guiding the meeting process.
 - b. Intervene in a timely and professional fashion when the meeting veers off track.
 - c. Determine *how* you will handle tech devices for each meeting (i.e., silenced for all/checked at the door to provide full concentration on the agenda; limited access- during breaks only; *collectively* determined hybrid option).
10. **Complete a self-evaluation** - consider where you felt that you demonstrated your strengths versus where you were at a loss for the correct behavior/self-regulation to move the meeting forward.