

## **Before the Meeting**

1. Decide if the meeting is necessary. What type of meeting is required? In person, virtual or both. Why is the meeting necessary? What is the goal of the meeting?
2. Make sure key stakeholders are invited. Does the content of the meeting correspond with the role, expectations and needs of attendee's?
3. Is an outside facilitator required to better manage the content and process of a specific topic?
4. Create the agenda and a time period for each item. You can create a working agenda with more detail for the facilitator and an outline agenda with topics for attendee's.
5. Decide what type of participant introduction process you will use. Decide how much information you want participants to provide during the introduction.
6. Send pre-work meeting material at least 7 days in advance of the meeting. This allows participants the opportunity to come prepared to discuss agenda items. This also sets the stage for creating action items at the end of the meeting.

## **During the Meeting**

1. Create a comfortable atmosphere. When the energy in the meeting is relaxed, participants are more likely to engage in open dialogue and to freely share their opinions and ideas. The facilitator should intentionally use an accessible style of communication such as smiling, and asking questions and encouraging input.
2. Engage in active listening. Listen to each participant as though they are your teacher and you are there to learn.
3. Set ground rules. Decide as a group what type of behavior is acceptable. Will raised hands be used to ask questions? How will requests for clarification be handled? Interruptions? Staying on topic?
4. Make time for introductions. Model the type of introduction you want by introducing yourself first.
5. Keep the group focused. Create a "parking lot" for off topic items. Stay on track with the current agenda item.
6. Encourage everyone to speak and share their particular viewpoint. It is important to hear from all of the participants especially when items require a decision to be made.
7. Discourage "side talk". When two people in the meeting begin their own discussion while the meeting is in progress it creates distraction and prevents the group from remaining focused.
8. Ask participants to speak for themselves only. Stay away from vague references such as "we", "they" or "some people". Ask participants to own their statements. This will develop trust in the group.
9. Assist the group with decision making. Explain what item needs a decision. Ask for individual decisions or recommendations. Point out areas of agreement and state them. Encourage participants to think of ways to compromise. How the decision is made will vary depending on item being discussed, role/position of the facilitator and purpose of the group or meeting. Below are five common methods in decision making for leaders.

a. ***Level One: Leader makes the decision alone.***

*This is used especially in emergency situations where immediate action is critical. Input is not helpful, quick action and immediate compliance is what counts.*

- b. **Level Two: Leader makes the decision with input from key stakeholders.**  
*The leader seeks input, usually to cover blind spots and enhance their depth of understanding around the issue to be decided. Stakeholders hold important information and not consulting them would be foolish.*
  - c. **Level Three: Consensus building – leader gets final say.**  
*Leader solicits input from a variety of sources, builds consensus around a specific direction, allows the group to make a recommendation of which the leader must finally approve. This level takes considerable skill and is where developing leaders often make mistakes. Solid decision makers are well versed in the skill sets of this level.*
  - d. **Level Four: Delegate the decision to someone else.**  
*The authority and responsibility are clearly shifted away from the leader (usually to a direct report). Both the leader and the direct report live with the consequences – good or bad. The leader reviews the decision, but does not change it and uses it as an opportunity for development.*
  - e. **Level Five: True consensus.**  
*Leader fully delegates the decision to a group (usually a committee). If the leader is part of the committee then he/she is just one vote among many. The group processes all the decisions involved, compromises positions until everyone is in agreement.*
10. If time becomes an issue bring it to the groups attention and clearly state if and how other agenda items will be compromised. Be somewhat flexible with time especially if the agenda item is important to the whole group.
  11. If coming to a decision is proving more difficult than expected then decide as a group when and how the agenda item will be revisited.
  12. Schedule the next meeting and have the group assist with adding agenda items.
  13. Use humor to alleviate tension.
  14. As the facilitator make an effort to remain as neutral as possible. If there is a conflict of interest on a particular item ask someone else to facilitate during that discussion. This should be planned well before the meeting.
  15. Take regular breaks to increase energy and attention span.
  16. Define action items and who is responsible for what.
  17. End the meeting on a positive note with a sense of unity and closure. Some ideas are: allowing each person to share how they felt about the meeting, everyone shakes hands at the end, allowing some time to quietly review agenda items and the next meetings proposed agenda items.

### **After the Meeting**

1. Thank participants for attending the meeting.
2. Send out meeting minutes within the time agreed upon.
3. Ask for feedback on the meeting.