Meeting Planning Steps for Facilitators

1. Define meeting objectives

- Works well to write a purpose statement or objectives.
- Best if there's buy-in from group leaders and key stakeholders.

2. Decide who, where, and when

- Based on the objectives, decide how long your meeting should be, who to invite, where or how to have the meeting, and when it should be.

3. Design the agenda

- Designed to meet the objectives.
- Proper sequencing of events.
- Note how much time you expect each thing to take.
- Share it in advance with participants so they know what to expect.

4. Decide the ground rules

- In light of the objectives and the group culture.
- Sometimes called meeting guidelines or the facilitation contract.
- Basically, these are talking points for what the facilitator is going to explain at the start of the meeting; how they plan to run things and what they are asking participants' help with.
- Perhaps let the group invent and decide their own ground rules, especially if they plan to be meeting over and over.

5. Become familiar with the topic

- The facilitator doesn't need to know "everything." It's actually helpful to not know everything, to be able to ask simple questions as an outsider.
- Yet it is important to know the jargon, the language, the acronyms. Know enough to understand what people are talking about.

6. Plan how each agenda item will be handled

- Make a staff agenda or facilitation plan: behind-the-scenes notes and prompts for how every agenda item will be handled

- List all the prep required: slides, charts, handouts, Google Docs, support documents.
- Imagine what might go wrong or different and have plans in mind.

7. Plan the room set up or online set up

- Physical room
    - Tables, chairs, projection screen, charts, wall space, microphones, handouts, name tents or name tags, how food will be handled.
- Online space
    - Format/platform, Google Docs, slides, uses of the chat, polls

8. Prep and pack

- Make all your props: handouts, Google Docs, slides, charts, games, etc.
- Test your equipment and your software. Extra batteries on hand.

9. Arrive early and set up the room or online space

- Have everything set up by the time people arrive so you don't have your head down working, but have your head up and greet people as they arrive.
- Make your space look professional and welcoming so it provides confidence that the meeting is going to be well-run.