Pillar 3: ENGAGE

Facilitation Plan Templates

Purpose of this template: To develop a structure for an effective (and smooth running) meeting and plan for what might go wrong.

Directions: Use this template to begin creating a facilitation plan similar to the table below. The following tips provide guidance when planning a meeting/event. After the initial attempt at a facilitation plan, it is a good practice to connect with stakeholders to fill in gaps and check your assumptions.

In-Person Meeting Facilitation Plan Template

#	Time	Duration (in minutes)	Agenda Item	Lead Person	Notes/Logistics
0	8:00 am	60 mins	Room Setup	John Doe	Set up tables, chairs, screen, food prep, posters/easels
1	9:00 am	15 mins	Welcome and Introductions	Jane Doe, Facilitator	Handout Agenda
2	9:15 am				
3					
4					
5					
6					
7					
8					
9					
10					
11					

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Virtual Meeting Facilitation Plan Template

#	Time	Duration (in minutes)	Agenda Item	Lead Person	Notes/Logistics
0	8:00 am	60 mins	Tech run through	John Doe, Jane Doe	Test translation, set up polling, check social media accounts, gather rosters, sound checks, load presentations
1	9:00 am	15 mins	Welcome and Introductions	Jane Doe, Facilitator	
2	9:15 am				
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

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Meeting Planning Worksheet

Initial Preparation

Item	Fill in
Why is the meeting being held?	
What is the purpose of the meeting? Why are we gathering?	
What tasks are planned?	
What are the goals of the meeting?	
Is this meeting part of a larger goal/ effort?	
Who is invited? Are the right people there?	
When is the meeting to be held? How much time is planned for the meeting? Is it the right amount of time?	
Where or on what platform is the meeting to be held? Is the location or platform accessible for the audience?	
Is the meeting room set up properly? OR Have all tech logistics been considered?	

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Tips for Building a Successful Agenda

1. Ensure multiple voices are heard (not just yours as facilitator) as far as presenters.
2. Use icebreakers that create opportunities for participants to know who is in the room and build relationships if possible.
3. Consider appropriate length for presenters. Ideally do not present information "at" people for more than 10 minutes.
4. Will there be an opportunity for everyone to speak?
    a. Structured opportunities for all to speak include:
        - Pairs. Have "neighbors" (or dyads) discuss an issue
        - Structured Go Around. Have each person share a thought on an issue
        - [To a lesser degree but another option] Divide group into two "sides" of room (two medium size groups)
        - Virtual break out groups
5. Consider learning styles (visual, tactile, auditory, etc.).
6. Acknowledge the efforts of those who helped plan the meeting and/or those who have completed action items from the previous meeting.
7. Provide short 5-10 minute breaks for participants every couple of hours.
8. Consider the final "take away" your most influential members will leave with.
9. Always use a method that properly closes out a meeting. Provide next steps, any follow ups and/or announcements.

Getting Buy-in for Your Agenda

Make Individual Contact
After you have created a draft agenda, consider reaching out to one to three key meeting participants to ensure the desired meeting goals and related agenda content make sense to them. Adjust accordingly.

Create a Design Team
For ongoing group meetings of a complex or controversial nature, consider having a "design team." A design team would include two (or three) meeting participants who represent different perspectives. Having these people participate in planning the meetings will help to ensure the meeting presents a balanced approach.

Distribute Meeting Materials
Be sure to distribute meeting materials in advance. There should be agreement as to when materials will be distributed (i.e., two weeks, one week, three business days, etc.).

Provide Refreshments
If possible, have refreshments at your in-person meetings.

Facilitating the Meeting

Arrive Early to Ensure Proper Set Up
Arrive with plenty of time to move tables around as desired, set out materials and sign-in sheets. Test any electronic equipment. Be sure to find out who to contact if your room is too hot or cold

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or if you have problems with any equipment. Find out where the restrooms are located. Pay attention to seating arrangements and room set up. Different room configurations work better or worse depending on the type of meeting and the level of conflict in the room. Early arrival and a thorough technology run-through is important for virtual meetings, too.

Begin on Time/Acknowledge Start Time
Ideally, you want to start all meetings on time. This shows respect for participants who arrive on time. There may be instances when key meeting participants have not arrived, and you need to delay the start of the meeting. In this case, make an announcement to the group that the meeting will begin in "about XX minutes."

Keep the Meeting on Track
Your job is to keep the meeting on track. Examples of common situations requiring intervention include:
1) Side bar conversations
2) Staying on time
3) Never-ending or circular discussions
4) Returning from breaks
5) Challenging participants

TIPS FOR KEEPING THE MEETING ON TRACK

Limit Side bar Conversations
Side conversations may occur because you have spent too much time on the topic, or because they are self-important, rude, and unaware of the effect of their behavior on others. You cannot have an effective meeting with audible distractions. Try these mitigating tactics:
- Non-verbal.
    o Stand behind the people having the side bar conversation.
    o Type in the chat box (virtual meeting)
- Verbal.
    o Friendly reminder. "Just a reminder, we agreed to one conversation at a time today" or "We have about __ minutes of this presentation left; if everyone could please stay focused, and then we'll have Q/A".
    o Direct the reminder. Make eye contact, "One conversation at a time please".
    o Personalize. "Jose, do you have a question of clarification" or "Jose, I can see you have something to contribute. When the speaker is finished, I'll put you first in the queue."
    o If many are having side bar conversations. "Do we need to take a break?"
    o For virtual meeting, request that the chat dialogue stays focused on the topic at hand.

Staying on Time
- Off topic conversation. Consider using a "Parking Lot" list.
    o "You have raised an important issue; I am listing that on our Parking Lot list to ensure we discuss it at another time. At this time our focus is: _____."
- Later agenda item. If something that will be covered later is brought up, ask them if they can hold the thought. If it appears two agenda items should be combined, ask the rest of the group if they would like to combine them and take up the topic at hand now.

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Prepare for Long Discussions
- Note the amount of time available for discussion at the beginning of the agenda item.
- Note how much time is left periodically during the discussion.
- Note how many additional speakers/comments you will likely have time for during the time allotted.
- If there are many in the queue, ask all to be very pointed to ensure all can contribute.
- If time looks short, ask the group what they want to do.
    - Shorten or eliminate another agenda item?
    - Take up the conversation at another meeting.
    - Extend the end time for the meeting (if so, by how many minutes).
- Acknowledge time constraint; ask if anyone needs additional information before making a decision on the topic at hand.
    - If yes, more information is needed, propose another time to take up the agenda item.
    - If no, use that as an opportunity to close the discussion and move to action.

Returning from Breaks
- Do not be shy; find those in the 'hallways' to tell them you are starting.
- Enlist someone who is respected by others to tell folks you are starting back up.
- Find a couple key participants and start back with them; others will notice the meeting has started back up.
- Tell an individual that is in the hall you need their input on the next agenda item.
- Return on time and restart on time, especially with virtual meetings.

Ground Rules or Group Agreements
Ground rules help meeting participants establish appropriate ways to interact with each other during the meeting. You can suggest a set of ground rules or ask the group members if they would like to develop their own ground rules. Example ground rules include:
- Listen to and show respect for others' opinions
- No side bar conversations

Ground rules are not necessary for every meeting. It will be up to you to decide. Consider:
- How contentious are the issues at hand?
- How often will the group meet?
- Will new people come in and out?
- Will the participants remain the same?

Logistical Questions to Consider

- Who will facilitate?
- Who will take notes?
- What are options for providing comment (handwritten / verbal / post-it / dots / etc.)?
- Who will compile comments that are gathered?
- Who / how will data be 'themed' and analyzed?
- How will in-person input be aggregated with input received online?
- How/when will the public see what happened to their comments?

- What will be done with 'off-topic' comments or concerns?
- What is 'Plan B' if there are very disruptive folks/people with very strong emotions/concerns?

Technology Tips for a Smooth Virtual Meeting

- Explain controls:
  - Renaming
  - Mute
  - Raise hand
  - Join interpretation
- Describe how to submit public comment during the meeting
- Announce that the meeting is being recorded; confirm recording location
- Provide guidance/parameters on using Chat box
- Consider including ground rules or group agreements
- Include side-by side bilingual slides

TITLE
DATE | 9:00am-12:00pm
LOCATION
Spanish Translation, ASL

Purpose of the meeting:

Agenda

Time	Agenda Item	Lead	Handouts
9:00-9:30 am **(30 mins)**	Welcome • Introductions • Review Agenda	Facilitator Program Manager Community Co-Host	Agenda
9:30-10:00 am **(30 mins)**	Informative Agenda Item • Topic 1 • Topic 2	Expert 1 Expert 2	Fact Sheet
10:00-10:25 am **(25 mins)**	Q&A	Expert 1 Expert 2	
10:25-11:00 am **(35 mins)**	Interactive Agenda Item • Topic 1	Facilitator Expert 1	
11:00-11:10 am	Break		
11:10-11:40 am **(30 mins)**	Interactive Agenda Item • Topic 2	Facilitator Expert 2	Fact Sheet
11:40-11:55 am **(15 mins)**	Wrap Up • Summarize Outcomes • Next Steps • Q&A • Meeting Evaluation	Facilitator Community co-host	
12:00 pm	Adjourn		

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