



## FACILITATING EFFECTIVE MEETINGS CHEAT SHEET

This “cheat sheet” is designed to help you think through the things that go into preparing for, conducting, and following up on meetings to make them as effective and meaningful as possible.

### ***Before the meeting***

- “Most of the facilitation happens before the meeting” – preparation is key for effective meetings!
  - It’s not unusual to spend two hours preparing for every one hour of the actual meeting (i.e., a 2-hour meeting might take 4 or more hours of preparation).
- Consider doing some assessment to inform the purpose, objectives, and design of the meeting.
  - This could include anything from a short survey to a few informal phone calls to formal interviews to help guide the design of the meeting/process.
    - A meeting is an “intervention” – do some “diagnosis” to inform what intervention is needed/appropriate.
  - A good assessment will help you figure out:
    - What is the purpose of the meeting?
    - What conversations do we need to have?
    - Who needs to be involved, how, and why?
    - How should the meeting be structured and framed to set it up for success?
    - What information do people need in advance to engage effectively?
    - What pitfalls need to be avoided?
- Determine the purpose of the meeting:
  - What work does the group need to do?
  - What conversations does the group need to have?
- Clarify the desired outcomes.
  - Check these with the group before or at the start of the meeting, e.g.:
    - “Where would we like to be by the end of this meeting?”
    - “What would the outcomes of a successful meeting be?”
    - “Here are the outcomes I think we want to achieve by the end of this meeting. Am I missing anything?”
- Decide who should attend and how:
  - Who needs to be part of the conversation?
  - May include technical experts or advisors
- Draft an agenda.
  - Questions to ask yourself to inform the design of the meeting/agenda:
    - What conversations do we need to have and who needs to have which conversations?
    - How can we structure the conversations so that people can effectively have those conversations?
      - Liberating structures are really helpful for this! An agenda can basically be a chain of these exercises! <http://www.liberatingstructures.com/>

[Wallace Stegner Center Environmental Dispute Resolution Program](#)

S.J. Quinney College of Law, 383 South University Street, Salt Lake City, UT 84112

<https://sjquinney.utah.edu/stegner-center/edr/>

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- How can we structure the meeting to encourage and facilitate meaningful engagement from all parties (including those who don't tend to talk as much)?
        - Consider small group conversations, sticky note or index card exercises (if in-person) or chat exercises (if online), and round robin sharing.
  - When designing a meeting, remember that the facilitator's job is to help the group do its work, but it is the group's job to do the work. How do you design a meeting that helps the group do their work?
  - Build in extra time in case things take longer than expected or other important issues arise.
    - This is especially important for online meetings – there are a lot of variables that can throw timing off.
    - One way to do this is to have “optional” exercises or prompts toward the end of the meeting that you can do if you have time or skip if not.
  - Keep it fun.
    - Meetings can (and should be) fun and productive. Think about how to include interactive, fun activities that help the group “do its work.” Get creative.
      - The Liberating Structures Toolkit is helpful for this!
    - Integrate fun exercises to start, break up, or wrap up the meeting.
  - Send the agenda out in advance (or go over it at the start of the meeting) and ask participants whether anything is missing.
- Delineate roles and responsibilities.
  - Think about all of the things that need to happen, then figure out who is going to do what (from taking notes to making coffee).
    - If online, think about who is going to monitor the chat, who will put people into breakout rooms, etc.
    - Be realistic about your limitations and the needs of the meeting. For example, most people cannot smoothly facilitate a meeting, move people into breakout rooms, and track the chat during an online meeting—so delegate these roles!
  - It is often helpful to have an internal agenda that explains who does what and when (even if just for yourself!).
    - For online meetings, list out which exercises you are going to do virtually, how, what prompts to paste into chat, etc. – make it easy to follow your plan!
- Draft and/or clarify ground rules and decision-making procedures.
  - Perhaps run these by the group before the meeting.
  - See our example ground rules for meetings and etiquette for online meetings below.
- Think carefully about when to hold the meeting, where, and how.
  - If in person, think carefully about location and room set up to make it as easy and inviting to engage as possible.
  - If online, think about what platform or method makes it the easiest for people to engage while providing the functionality you need.
    - Sometimes just a phone call is fine, or even better than, a video call.
    - Sometimes you need breakout rooms, so you will want to use a video conference platform that allows for that.
- Share relevant information before the meeting:
  - What do people need to know in advance and/or think about to come prepared?
  - Consider sending out the draft meeting agenda, meeting ground rules, questions or topics you want people to think about in advance and come prepared to discuss, and anything else people need to see in advance to come prepared to engage effectively.

### ***During the meeting***

- Show up early to set up and show up prepared.
  - If meeting online: Log in early! Make sure everything is working.
- Be clear about what the objectives of the meeting are and make sure those guide the meeting.
  - Perhaps ask participants if there are any other objectives they want to achieve.
- If you do introductions, give people clear prompts and timelines for their introductions, and consider using introductions as a way to get important information into the conversation.
  - For instance, you might ask people to “In less than 30 seconds, introduce yourself by name, title, organization, and one idea you have for how to address X.”
  - If using a video conference platform, consider asking people to name/rename themselves to share important information (e.g., organization or region). If you do this, walk everyone through how to do so.
- When asking people to respond or chime in, consider giving them a little bit of time to think before responding. Doing so will encourage thoughtful responses and make it more inviting for less extroverted thinkers to engage.
- Implement ground rules.
- Facilitate clear communication.
  - Good meeting structure helps with this!
  - Online meetings require even more structure than in-person meetings to create space for clear, effective communication.
- Facilitate interest-based collaborative problem-solving.
  - The EDR Program teaches courses on this if you want to learn more about how to do it.
- Intervene when the group’s effectiveness is at-risk while leaving space for the group to do its work.
- Help the group move through impasses.
- Bring issues to some closure.
- Serve as the group memory.
  - It might be helpful to designate someone to take notes (and, if meeting online, someone to watch the chat and raise concerns/questions you miss).
- Know when to stick to the agenda and when to deviate from it.
  - If the agenda isn’t working or people need more time to have an important conversation, don’t be afraid of altering the agenda – just do so intentionally.
- At the end of the meeting, share back action items and next steps you have captured (or have the notetaker do this) and ask the group if anything is missing.
  - Make sure someone is responsible for each action item. If there isn’t someone for an item, ask the group whether someone will take responsibility for it; if no one volunteers, ask the group to consider if the action item can be left off the list.
  - Consider capturing agenda items for the next meeting, if relevant.
- If meeting via a video conference platform, consider unmuting everyone at the end for a group goodbye.

### ***After the meeting and between meetings***

- Prepare and send out a meeting summary.
  - Designate someone to help with this, if need be.
  - Your summary is only as good as your notes and memory – good meeting notes are very helpful.
  - Think about the purpose of the summary and tailor it accordingly. More often than not, just a list of action items and key takeaways from the meeting are much more useful than running meeting notes.

- Put the action items (what needs to happen by when and who is going to do it) at the top of the meeting summary.
  - If the meeting summary won't go out right away, consider sending an email with just the action items soon after the meeting.
- Consider including agenda items for the next meeting in the meeting summary.
- Follow up and make sure action items get done.
  - Send reminders.
- Conduct side conversations as needed to move things forward.
- Prepare the agenda for next meeting, if relevant.

## ENVIRONMENTAL DISPUTE RESOLUTION PROGRAM GROUND RULES

The Environmental Dispute Resolution Program has developed the following ground rules, which we use in most of our meetings and trainings. You are welcome to use these ground rules for your meetings.

- *Respect Each Other*
  - Listening is important
  - One person speaks at a time
  - No interrupting
- *Respect the Group*
  - Every idea is worthy
  - Make your points succinctly
  - Everyone has an equal right to talk
- *It's OK to Disagree – Agreeably*
  - Challenge ideas, not people
  - No “zingers” or cheap shots
  - Disagreement is an opportunity to learn
- *Keep the Conversation Constructive*
  - Explain your reasoning
  - Keep an open mind
  - Avoid passing judgment
- Please take responsibility for the energy you bring into the conversation

## EXAMPLE GROUP ETIQUETTE FOR USING ONLINE MEETING PLATFORMS

When conducting meetings virtually, set participants up for success by clarifying etiquette and rules for engagement. You can send these out in advance and/or go over them once people are on the call. Some instructions you might consider include:

- Stay present
- Headphones are really helpful – use them if you have them
- Mute and unmute skillfully
  - Keep yourself on mute in the full group unless you are talking – avoid background noise
  - Remember to unmute when you want to talk
  - Unmute when you're in breakout rooms to allow for free-flowing conversation
- Keep your camera on
  - Unless you need to step away for any reason or need a break from the screen – that's ok
- If you need to step away, mute yourself and turn video off, then come back on when ready
- Using breakout rooms:
  - Go to your breakout room when asked (and return to main room when asked)
  - The host may pop in and out of breakout rooms (with video off and on mute)
- Using chat:
  - Chat with purpose
  - Make sure your chat is going where you want it to (e.g., to the full group or to a specific person)
- If you want to chime in while in the full group, you can:
  - Physically raise your hand, just make sure the host can see it
  - Virtually raise your hand