Facilitation Best Practices

MEETING ENGAGEMENT TOOL

Description

Facilitators use their knowledge and skills to design and implement successful meetings that allow participants to have discussions, reach agreements, and make decisions. Meeting facilitation can help achieve this by encouraging and managing participants, ensuring that the contribution of all participants is treated equally, building trust and encouraging input.

Participants

Facilitator and meeting leader.

Process

Before the Meeting:

1. Establish Discuss and clearly define meeting objectives with a planning team comprising the leader, co-facilitators, and hosts.

2. Work with the planning team and develop a plan to reach the meeting objectives. Consider the level of participant engagement, and vary it throughout the meeting.

3. Capture meeting objectives and plans in a detailed process agenda.

4. Determine the meeting logistics and room setup, and record in the process agenda.

5. Ensure that the room setup helps you achieve your objectives.

6. Make a list of materials needed by the facilitators and participants in the meeting.

7. Determine if pre-meeting work is needed and share with invitees before the meeting.

During the Meeting:

1. Do not join the content discussions, and remain neutral at all times. If you must add some information that is content, let the group know you are "taking off your facilitation hat" first.

2. Start and end on time.

3. Build rapport and trust with the audience during the introduction.

4. Develop ground rules with the group to gain early agreement and buy-in to the meeting.

5. Work to ensure that all participants have an opportunity to contribute to the conversations.

6. Capture important points on flip charts or a screen so that everyone can see them and understand what has been shared.

7. Gently curb disruptive behaviors before the group loses productivity. Visit *coast.noaa/DDB* for ideas on how to manage disruptive behaviors.

8. Work with the audience to ensure forward progress, and adapt the agenda as needed to accomplish meeting objectives.

9. Treat everyone in the group equally; all are valued members of the conversation.

10. Listen carefully to what people are expressing, and ensure that they know they have been heard.

11. Read body language and adapt if there are disagreements, restlessness, or other physical signs of an issue in the meeting.

12. Provide plenty of breaks and access to necessary amenities like restrooms, food, and drinks.

13. Share next steps with the participants so they know how their input is used.

Benefits

- Meetings are directed, productive, and effective.
- Objectives are understood and accomplished.
- Participants feel their time has been well spent.
- Participants build consensus and buy-in for next steps.
- Projects and products are successful.

Considerations

- Do you have access to facilitation services or a budget to hire facilitators?
- How many facilitators will be needed? If the audience will be large, or there will be small group discussions, consider securing facilitators for each group. If you will be offering remote participation, provide additional facilitation support for those on the phone.
- Who is the decision maker in the room? You may need someone to turn to when a decision needs to be made, and it is important the decision maker hears the discussion.

- Do the meeting organizers have a clear understanding of what they want to accomplish during the meeting, and are they in agreement on their objectives?

- Do you have enough time to design and implement the meeting?

- Are the participants willing to work together?

- What are your resource constraints, including facilities, timing, and technology?

- Manage participants' expectations by defining their roles in the discussion and decision-making process. If they are only making a recommendation, it is important that they do not think they are making the decision.

Resources Needed

- Weighted Planning team (2 or more people).

- A process planning agenda.

- The right participants for the conversation.

- A room with tables and chairs arranged as you have specified.

- Materials and supplies as listed on the process agenda.

- The right amenities.

For Additional Information

- Facilitation Techniques Quick Reference

- Techniques for Facilitating Virtual Meetings

- Introduction to Planning and Facilitating Effective Meetings

- Introduction to Stakeholder Engagement

- How to Facilitate a Virtual Meeting

- Process Agenda Template