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***HELPING PEOPLE & NONPROFITS THRIVE!***

## **Fearless Facilitation Checklist**

- **Clarity:** purpose is to serve group and meeting. *To facilitate* means to make easier or less difficult. *A facilitator* is a person who makes a groups worked easier by structuring and guiding the participation of group members.
- **Planning:**
  - Develop agenda prior to meeting.
  - Plan structure and format appropriate to each agenda item.
  - Advance written agenda: meeting purpose and objectives, purpose for each agenda item, and timing (see appendix samples).
- **Ground rules:**
  - Agreements on meeting values and behaviors.
  - Provide basic list, ask group to add (see appendix sample).
- **Letting group know what to expect from you as a facilitator:**
  - Will keep the meeting focused.
  - Will stick to the agenda.
  - Will not participate in the meeting.
  - Might interrupt; facilitators are exempt from social graces, though interruption will be diplomatic, *hopefully* during a pause.
- **Taking chart pad notes:** helps pace discussion; enables meeting participants to track main points.
- **Time check:**
  - Focuses group.
  - Reminds group that time is not unlimited.
  - Nudges individuals to speak concisely.
- **Checking in with group:** shifts energy; acknowledges situation affecting entire group; discourages agenda changes not agreed to by meeting participants; examples include:
  - Getting agreement from group to change agenda or extend meeting time to accommodate extending an agenda item.
  - Observing that the group losing energy, or stuck, and how to address it.
- **Forwarding phrases:**
  - Thank you.
  - We need to move on, we have 4 agenda items and 15 minutes left before this meeting ends.
  - Unfortunately, that's not on the agenda; perhaps it can be placed on the next meeting agenda.
- **Standing up:** can signal that it's time to move on, can contribute to calming a heated moment.