

Checklist to Set Up and Launch a Meeting

These are ticklers and choices, not a prescription.

Plan Meeting Logistics

- ▶ Room: available for set-up at _____;
- ▶ Food: healthy, snacks, lunch, who is providing, place order, pick-up or delivered
- ▶ AV and PowerPoint equipment and extension cords
- ▶ Easels: how many; who's bringing?
- ▶ Paper: 8½ by 11 white, blue, green, yellow, pink, flip chart tablets
- ▶ Wall space: how much, pictures to be moved,
- ▶ Masking tape or pins: OK on walls?
- ▶ Markers: base colors and highlights
- ▶ Room temperature and ventilation: can we control?
- ▶ Lighting and glare: can we control?
- ▶ Tables: how many; arrangement?
- ▶ Chairs: how many; how uncomfortable are they?

Before the meeting

- ▶ Tune the room!
 - Establish focal points in the room
- ▶ Consider sunlight and acoustics
 - Hang Magic Wall(s)
 - Arrange chairs and tables
- ▶ Allow space between chairs and between aisles
- ▶ Put a curve in rows
- ▶ Set up refreshments.
- ▶ Hang directional signs

The following template provides a menu of possible warm-up comments and ticklers. The intentions and unique qualities of each meeting and group will guide your selection of appropriate warm-up elements.

Contract for Roles

- ▶ My role is to help your work to be easier and more productive: often that means focusing your attention and conversation. I may need to interrupt you to do that.
- ▶ I'll signal if I feel the need to change out of a neutral role.
- ▶ Ask Do I have your permission to function in this role today?
- ▶ As I understand it, your roles are _____
- ▶ Ask Are you willing and able to function in your roles today?

Review the Let's Leave With List

- ▶ It's the focus of the meeting.
- ▶ Everyone is encouraged to point out if we begin to wander from it.
- ▶ Ask If we focus on this list, will it be a good use of our time?

Preview the Agenda

- ▶ If we can get ahead of schedule, we will.
- ▶ If we get behind, I'll ask how you wish to revise the agenda or our adjournment time.
- ▶ Ask Is everyone willing to help us stay on track and on time?

Ask for Agreement on Things that will HELP our Work

- ▶ Speak loudly so we can all hear and understand one another.
- ▶ One person at a time.
- ▶ Be open to open-ended thinking - if you are impatient for narrowing and decision-making, then breathe and relax until we get there.
- ▶ Check for Understanding and Agreement - please give me a sign.
- ▶ Ask Do these work for everyone?

Ask for Agreement on Things that will HINDER our Work

- ▶ Speeches - catch yourself, or we will, or I will.
- ▶ Cell phones and pagers ringing and causing people to leave the room.
- ▶ Keeping your thoughts quiet until after the meeting.
- ▶ Irrelevant, gooney facilitator games.
- ▶ Ask Do these work for everyone?

Choose Decision-making Tools

- ▶ If consensus, agree on a definition, such as:
 - I'll work to implement the idea even though I don't agree with it completely, or it's not my first choice. If I have serious misgivings, I will speak up.
- ▶ Vote.
- ▶ Make a recommendation, and/or defer to a decision-maker.
- ▶ Defer to a small group for further development.

Explain Tools We'll Use

- ▶ Magic Wall, with each of you writing your ideas on sheets of paper, then posting them for the group.
 - One idea/comment per sheet
 - Use landscape format
 - Write with a marker in big, clear letters so we can read it from our chairs
 - I will hand out several colors of paper to make it easier to keep track of topics.
 - We'll have short periods of silence for thinking and writing.
- ▶ Popcorn format, or Round robin.
- ▶ Parking Lot - to be used for future meeting agendas.

Arrange for Comfort

- ▶ Bathrooms are....
- ▶ Refreshments - serve yourself anytime.
- ▶ Take care of your needs - stand, sit and move around.
- ▶ HVAC control.
- ▶ Lighting control.
- ▶ Weather contingencies?

Request Brief Introductions (sample questions)

- ▶ Name, affiliation, town, etc.
 - What is one word that comes to mind as we get started today?
 - What question is on your mind as we begin?
 - Name a relevant skill, or a perspective, that you bring to this gathering.
 - What is something surprising we probably don't know about you?
 - When was the last time you did something for the first time? What was it?
 - What is your role – short term or long term – relative to the issue we are addressing today?