
Team Meeting Facilitation Cheat Sheet

Suggested Regular Team Meeting Structure (Keep meeting to 30 – 45 minutes)

1. Short welcome to everyone; ask for any key news (social)
2. Review of last meeting's action items for a quick status update (complete or ongoing with new finish date)
3. New action items list
4. Issues (for capture on the flipchart and resolving in another forum).
5. Recognition for Accomplishments
6. Meeting Process feedback: Did well/Do differently

Meeting Roles and Accountabilities

Chair

- Leads meeting (Opens meeting, has final yes/no on meeting direction)

Facilitator (rotating role)

- Accountable for meeting process (how we deal with each other, how the meeting runs)
- Keeps an eye on the time spent on each part of the meeting; brings it to the attention of the chair and other participants if an item is running long
- May capture key notes on the flipchart (If the meeting is long or the items are complex, can recruit a scribe to capture notes.) Capture: Last Meeting's Action Items; New Action Items, Issues list
- Process checks:
 - Speaks up if we have spent too much time on one item and asks the group if they would like to move on to the rest of the meeting topics or if this is important enough for the group to divert their focus.
 - Ensures all participants have an opportunity to participate; conducts "temperature checks", e.g., "Let's hear some quick feedback from each person."
 - Ensures a small number of participants do not spend too much time on an issue not relevant to the group as a whole (general guideline: if an issue has taken more than 3-5 minutes, then it is time to ask "Should we continue on this issue or take it offline?")
 - Monitors ground rules and brings to the attention of the group if a ground rule is being violated. ("Note that one of our ground rules is that everyone have the right to participate and I am noticing that this part of the meeting is not including everyone. OR "We agreed that one of our ground rules is to clarify our decision making process. Are we at the input stage now or are we making the decision or will we be escalating?")
 - Conducts quick meeting process feedback at end of meeting. ("What did we do well this meeting? What would we do differently for next time?")
 - Ensures a set of notes is circulated in a timely way and/or the flipchart is updated and posted so that people can keep track of action items.

Participants

- Monitors own participation to be consistent with team ground rules.
- May raise a process issue if the facilitator has not yet commented.
- Accountable for own action items.

Sample Questions for Clarification of Issues

- What is the problem? (concrete, realistic description)
- What data do we need?
- What do we think the might be the causes?
- What hunches do you have? What is your intuition telling you?
- What alternatives could there be?
- What patterns do we see?

- Which alternatives are practical?
- What are the consequences of each alternative?
- What are the pluses and minuses? What's the best case outcome? Worst case?
- What values are important in this decision?
- What people effects will this have?
- How will we engage people?
- Who will communicate what key messages to whom?

Sample Team Notes Format

Team Meeting Notes (August 17, 2010)

Attendance		
George Archibald	Marie Dumont	Copernicus Smith
Galileo Curie (regrets)	Elizabeth King	Stan Yee

Action Items (last meeting)

1. Review reports for data accuracy (Marie) – Complete
2. Upload data to Finstrat system (Copernicus) – 50% (see issues)
3. Complete year-end post-mortem (George) – 80%
4.

New Action Items

1. Complete written report on year-end post-mortem (George)
2. Short list vendors for new system (Stan)
3. Hold business process requirement workshops (Galileo submitted earlier to facilitator)
4.

Issues

1. Data upload delayed by contractor illness, need to work a plan B (Copernicus and Elizabeth)
2. George will be away next week, need to brainstorm any gaps in coverage (George, Marie)
3.

Accomplishments

- Marie's team painstakingly reviewed all data reports and corrected some significant errors (will host a coffee party on Friday in recognition.)

Did Well/Do Differently

- Kept on topic
- Went too long on issue regarding data upload
- Better donuts! These ones were stale. (Should have put on action items!)