**Strategic Facilitation | Planning Worksheet**

Seventy percent of strategic facilitation happens before your meeting. Please reference the **Meeting Planning Guide** as you answer these questions.

**Facilitator Name(s):**

**Total Time:**

**Session Title:**

**Brief Session Description (about two sentences):**



**GOAL | Where are you going?**

**What is your goal for the meeting?**

Type your answer here



**PARTICIPANTS | Who’s coming with you?**

**Who are the key participants for your session?**

Type your answer here

**How will you make sure they attend?**

Type your answer here

**Where are they starting with regard to your meeting goal (knowledge, viewpoints, etc.)?**

Type your answer here

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**AGENDA | How will you get there?**



**Pre-work: Pack your suitcase**

**What do *you* need to do before the meeting to understand participants’ perspectives?**

Type your answer here

**What will you ask *participants* to do to prepare? How will that help with the meeting?**

Type your answer here



**Opening: Get on the road**

**What do you need to accomplish with your opening?**

Type your answer here

**What will you do? Consider the elements below and fill in the ones that you want to include in your opening.**

**Icebreaker activity? What?**

Type your answer here

**Introductions? How?**

Type your answer here

**Share agenda?**

Type your answer here

**Set ground rules? What are they?**

Type your answer here

**How much time will this take?**

Type your answer here

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**Activities: Plan your stops along the way**

**What are the key things that need to happen to achieve your goal? List each major step in your meeting below (you can add or subtract steps as needed). Then for each step, determine the activity you will do, how much time it will take, and any logistical needs. Finally, consider if you need to build in any time to transition between activities – this is especially important if you will be breaking into smaller groups.**

**Step 1:** Type your answer here

**Activity:** Type your answer here

**Time:** Type your answer here

**Logistics:** Type your answer here

**Transition Time:** Type your answer here

**Step 2:** Type your answer here

**Activity:** Type your answer here

**Time:** Type your answer here

**Logistics:** Type your answer here

**Transition Time:** Type your answer here

**Step 3:** Type your answer here

**Activity:** Type your answer here

**Time:** Type your answer here

**Logistics:** Type your answer here



**Closing: Arrive at your destination**

**What do you need to accomplish with your closing?**

Type your answer here

**What will you do? Consider the elements below and fill in the ones that you want to include in your closing.**

**Recap meeting accomplishments? How?**

Type your answer here

**Capture next steps? How?**

Type your answer here

**Have participants share closing thoughts? How?**

Type your answer here

**Share your own closing thought? What might it be?**

Type your answer here

**How much time will this take?**

Type your answer here

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**YOUR ROLE | Driver, navigator, radio controller?**

**For each of the major facilitator jobs, make a few notes on what techniques you plan to use. Refer to the Meeting Planning Guide for ideas.**

**Hold the goal:** Type your answer here

**Manage the flow of conversation:** Type your answer here

**Ensure balanced participation:** Type your answer here

**Clarify and connect ideas:** Type your answer here

**Wear two hats: Will you need to facilitate and contribute to the conversation? If so, what techniques will you use to manage this?**

Type your answer here

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**CHALLENGES | What hazards do you anticipate?**

**Imagine the group going through each of the activities you listed above. Given what you know about the timing, likely energy level of the group, issue you are discussing, and the individuals in the meeting, where do you think you might run into hazards? Use the space below to note potential challenges and strategies you will use to manage them. Refer to the Meeting Planning Guide for ideas.**

|  |  |
| --- | --- |
| **Potential Challenge** | **Strategies to Manage** |
|  |  |
|  |  |
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