Check List for Facilitating Meetings and Professional Development

Opening
- ☐ How will I know who is in the room and what they're bringing in with them—as far as their backgrounds, experiences, and feelings about the session? How do I get that information?
- ☐ How do I communicate the session's objectives and activities?
- ☐ How do I share where these objectives and activities come from?
- ☐ How do they see how these objectives are relevant to their work and where the learning will be applicable?
- ☐ How do I communicate expectations for behavior, norms, and engagement?
- ☐ Are there any norms that need to be requested (confidentiality?) and agreed on?
- ☐ Are there any other decision-making moments in the day? If so, how will they be decided?
- ☐ How do I make this an emotionally safe space?
- ☐ How do I show up as a compassionate listener?
- ☐ How do I communicate what to do with questions, concerns, requests? What structures capture these?
- ☐ How do I help participants get grounded and present for the session's learning?

Pacing and Tone
- ☐ How are participants seated? Random groups or predetermined? Can these change during the session?
- ☐ Do participants move physically throughout the day? Do people get up at least every 60 minutes?
- ☐ Does any segment go for more than 20 minutes without a shift?
- ☐ If participants don't know each other, what do they need to know in the beginning? (Names?)

Collaboration
- ☐ Are there structures for participants to learn from each other?

- How often do they talk to each other? How much of that talk is structured and how much is open?
- What is the purpose for each talk-time? (Meaning making, story telling, reflection, planning, etc.)
- Are meaning-making talk times varied in the numbers of participants who are engaged? Are there opportunities for dyads, pair-shares, trios, small groups, whole group?
- Are there opportunities to hear from each other in a non-verbal way? (Such as a chalk-talk)
- Are there opportunities to role play?
- Can participants coach each other? How do I set this up to be safe?
- Is there a "problem" that participants can solve together?
- Do participants have a chance to tell their stories? Does some of the talk invite personal stories?

Learning
- When do participants have choice during the day? Where do they get to direct their learning?
- How will participants remember what they learn?
- How can they have some experiences during the same day when they can apply their learning?
- Are there different ways for participants to experience input? (Reading, listening, watching a video or role play)
- How many visuals am I using? Are there a few memorable visuals?
- How many stories will I tell? When will I tell stories? For what purpose?
- Is there an opportunity to visualize some piece of the new learning?
- Can metaphor, simile, analogy be incorporated as a way to make meaning or remember learning?
- When can a graphic organizer be used?
- Are there opportunities for participants to write?
- Is there an opportunity to incorporate drawing?
- Are participants given an opportunity after every input piece to make meaning and capture learning?

Shifting Energies

- ☐ Are there moments when we might laugh? How can I plan for laughter?
- ☐ Is there an opportunity to include a video?
- ☐ When could I play music?
- ☐ Can I use quotes, a short story or poetry to engage participants in reflection and discussion?
- ☐ What can I do after lunch to avoid the sleepy slumber?
- ☐ Is there an opportunity for a walk and talk?

Closing

- ☐ How do I solicit the support that participants need in order to continue their learning?
- ☐ How will participants recognize and reflect on their learning during the day?
- ☐ How will they be able to assess how much they've learned?
- ☐ How will participants offer me feedback?
- ☐ How will I close the day and appreciate their participation?
- ☐ How can participants appreciate each other?