Facilitation Planning and Observation Tool

Facilitation Planning Tool		
1. Meeting Design Most design elements are visible in the participant's agenda. Some will be visible only in the facilitator's agenda.	✓	Evidence Comments Questions
Element | **Indicators**		
Why | The content of the meeting enables progress on the organization's goals, mission, or vision. This may or may not be directly stated.		
Why | The content of the meeting may reflect external input sources (e.g., feedback from surveys or previous meetings, input from stakeholders outside of the team).		
Why | The meeting is designed with an awareness of where the group is in its stage of team development. Activities and structures are intentional about developing the team.		
Why | The purposes for each section of the meeting are clearly articulated. Sections of the meeting are clearly distinguished, for example, learning, decision making, discussion, and information.		
What | Activities are sequenced to reach meeting outcomes.		
What | The emotional, cognitive, and energy needs of participants are anticipated. For example, breaks may be scheduled according to anticipated energy needs, energizers may be placed midday, or snacks may be provided.		
What | Activities are planned that will best navigate the group's dynamics. This planning may reflect an awareness of how power dynamics may manifest in this group and may seek to interrupt these dynamics.		
What | The facilitator's agenda includes procedural notes, precise timing, and scripts for items including the framing of different sections, transitions, and connections between segments. Facilitator's notes may anticipate participants' needs and reactions at different points.		
What | How and when feedback on the meeting will be gathered are indicated.		
What | Various structures are used that reflect best practices for the purpose of the meeting. For example, if the purpose of the meeting is to learn, then best practices in adult learning are applied. If the purpose is to make a decision, then protocols for decision making are used.		

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How	Plans include various structures to ensure equitable participation. Everyone will have a chance to speak during the meeting (although not necessarily in the whole group; it may happen in breakout groups or pairs).		
	The group's affective needs are addressed through structures such as a check-in, dyad, grounding, or intention setting.		
	Team norms are included on agenda, and a process for using them is indicated. Roles may include a process checker, or participants may be asked to identify a norm to hold for themselves.		
	Facilitator agenda may include notes about room set-up. For example, group may sit around one large table or in small configurations.		
	Roles such as timekeeper, notetaker, process checker, and facilitator may be identified. (If roles are used, then it is assumed that the group has clear understanding of the expectations for the roles).		
Who	Roles such as timekeeper, notetaker, process checker, and facilitator may be identified. (If roles are used, then it is assumed that the group has clear understanding of the expectations for the roles).		

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2. Meeting Execution Observable during meeting	✓	Evidence Comments Questions
Element / **Indicators**		
Key Facilitation Skills — Meetings stay focused and outcomes are met within the allocated time on agenda.		
Key Facilitation Skills — Participants are given time to make connections between a single meeting and the team and school's goals, vision, and mission.		
Key Facilitation Skills — Norms and community agreements are referenced during meetings; different structures are used to reflect on how the team holds norms.		
Key Facilitation Skills — Sections of the agenda make clear why the team is engaging in each activity and how it connects to larger goals.		
Key Facilitation Skills — Discussions and decisions are anchored in the needs of all students.		
Communication — Facilitator uses active listening and questioning that promotes open discussion.		
Communication — There are structures to invite equity of participation.		
Communication — Participants interact through various structures such as whole group, small group, pairs, and written processes.		
Communication — Facilitator addresses unproductive discourse such as blaming and deficit thinking and moves discussion to problem solving, asset-focused language, and action.		
Communication — Facilitator questions beliefs and prompts the group to examine the intended and unintended consequences of beliefs and actions.		

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Conflict Mediation	In moments of conflict the facilitator seeks to understand different perspectives, acknowledges views from all sides, and has strategies to redirect the energy toward shared ideals.		
	Facilitator manages disruptive or overly talkative group members.		
	Facilitator draws out quieter members of the group.		
	Facilitator addresses power dynamics in the moment or at other times if they are negatively impacting the group.		
Emotional Intelligence	Facilitator seeks feedback on every meeting and on their leadership skills.		
	Facilitator appears to be positive and calm right from the start of a meeting.		
	Facilitator displays optimism, confidence, and a positive, solutions-oriented attitude.		
	Facilitator honors obligations by following through, being responsible, and being willing to be held accountable by others.		
	Facilitator manages their own emotions, particularly in moments of conflict, challenges, or setback.		
	Facilitator admits to mistakes, faults, and areas for growth.		
	Facilitator demonstrates empathy authentically and regularly.		
	Facilitator engages team in self-reflection and evaluation, leading toward greater individual and collective responsibility.		
	Facilitator appears genuinely interested in developing every member of this group.		

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