

Clarifying Participants' Needs

Questions for consideration



Purpose

- Is there a clear meeting goal? Does the group need help articulating one?
- Are there any underlying needs to address? Is a pre-meeting required?
- If the meeting is intended to include decision-making, who has the final say?
- How does this meeting fit into the organization's overall objectives?
- What will success look like at the end of the day and how is it being measured?
- How complex will the subject matter be?

People

- Who is convening the meeting? (Are you the organizer, project sponsor, facilitator or all 3?)
 - Why do they want the meeting to take place?
 - What is their motivation? How does this piece fit into the larger picture?
 - If you are supporting the group in the role of an impartial facilitator: What is the organizer's experience in working with a facilitator?
- Who needs to be present? How many people are likely to attend?
- Whose needs do you have to consider?
- Do they know one another? Are they a team? Do they represent 1 or more organizations?
- What expectations might they have?
- Are they public servants or do they come from other sectors?
- Is there specific vocabulary the group uses with which you want to be familiar?

Culture

- What kind of personalities and styles do you have in the room? What kind of energy will you need to achieve your goal?

Preparing yourself

- Are you available? Do you have time to prepare, be present during the session and for follow-up?
- How comfortable are you being clear with yourself and your client about what you are comfortable taking on in terms of availability and skills?

Roles and tasks to consider

- Responsibility for outcomes (usually with meeting organizer) and process (with a facilitator if you are using one).
- Designing the process and agenda.
- Preparing any guest speakers or people taking on other roles (note-takers, table facilitators, etc.).
- Logistics (invitations, space, speakers, group configuration, information technology, audio-visual, etc.).
- Evaluation.

