ANTHROPOLOGY CAREER READINESS NETWORK

Facilitating Successful Meetings and Events

Facilitation is the art of making discussions as straightforward and streamlined as possible. It is often used in the context of an event or meeting. Facilitation is a skill that you can learn, which becomes easier with practice.

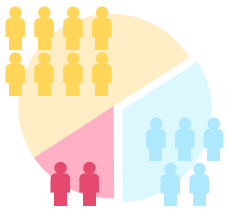
Use this timeline to prepare for facilitating a meeting or an event.

Plan

Allowing yourself time and space to plan ahead is the key to success.
Here are steps to take as you plan:

- **Ask** - Gather the requirements for the event or meeting
  Use your anthropology interview skills to find out the following:
  - Purpose/goal
  - Date/Time and confirm time zone
  - Group size
  - Audience makeup
  - Event format
  - Tools available
  - Expected outcomes (e.g., essential, desired)
  - Additional context

- **Brainstorm** - Imagine the many ways you could do what you want to do
  - Consider what tools you have at your disposal, what seems realistic, and what preparation is involved
- **Audience** - Know your audience
  - Include key stakeholders in planning if you can
  - Build in accessibility (e.g., captioning, alt text on slides)
  - Plan for distinct personalities (e.g., disruptive, skeptical)
  - Visualize yourself in the audience's place
  - Be ready to be surprised



- **Agenda** - Prepare your agenda and share it in advance
  - Outline the event timeline, recognizing that in-person events may last longer than virtual events (where the optimal time frame is one hour)
    - Note start and end times for each major section
    - Include date, time and time zone, location or link, purpose, goals, and agenda items

        - Remember to include breaks, particularly for in-person meetings
    - Plan your pivots
        - Add cushion time
        - Keep in mind what is essential
        - Share the agenda in advance
        - Be ready for feedback or changes
- **Tools** - Think through all the tools and support you will need for the event
    - *In-person:* Pens, paper, easel, projector, etc.
    - *Virtual:* Video conferencing software, collaboration software, etc.
    - Recruit backup assistance
        - Test out your setup with someone else
        - Make sure any helpers know their roles
    - Practice
        - Familiarize yourself with any software you plan on using

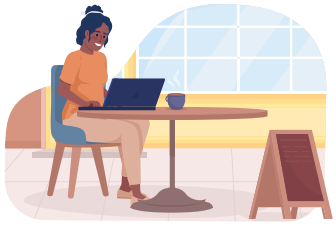
Do

On the day of the event, keep the following tips in mind:

- **Orient the attendees as they arrive**
    - Remind people in person to silence their phones before starting, or if virtual, explain how to mute themselves
    - Introduce yourself and review your agenda, making other introductions along the way
    - Instruct virtual attendees to share their comments and questions in the chat
- **Remember the show must go on unless it does not**
    - Be ready to modify or shift the agenda's direction to accommodate overall audience consensus or leadership input
- **If something is out of scope, send it to the "parking lot"**
    - Track and include "parking lot" items in your follow up or on the next agenda
- **Be assertive and remember your role**
    - Project confidence as you lead the meeting/event
    - Direct attendees back to the agenda if the discussion gets off track
    - Focus on getting audience members to participate
    - Handle your "wild cards" attendees with a combination of tact, patience, and humor
- **Use your backup assistant(s)**
    - Maintain your focus, delegating key tasks (e.g., note-taking, watching the chat)
        - Increase engagement by asking for volunteers verbally or in chat

Reflect

- **Celebrate the completion of the event, reflecting on these questions:**
    - What went well?
    - What could have gone better?
    - How should we do things differently in the future?



Follow Up

- **Provide follow up communication for attendees such as:**
    - Action items and next steps
    - Summary, notes, or recording
    - Resources
- **Connect with key stakeholders and share your reflections**