**Facilitation Event Checklist**

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| **Scope the Situation** |
|  | Understand the situation, what is/ has been happening, relevant data, trends |
|  | Determine product and people needed to make progress on the situation |
|  | Establish rational and experiential aims |
|  | Identify stakeholders and key participants |
|  |  |
| **Attend to the Process** |
| * **Prepare Design**
 |
|  | Write down rational and experiential aims |
|  | Ensure a concrete beginning point for your objective questions |
|  | Brainstorm questions that achieve the RA/EA |
|  | Select and order the questions you will ask (minimum 1 per level, more if needed) |
|  | Determine time for each question |
|  | Prepare your opening and closing carefully |
|  |  |
| * **Prepare Space**
 |
|  | Secure an appropriate space for the meeting design and attendance |
|  | Configure seating so people can interact with each other easily and see documentation |
|  | Have the space fully set up in advance  |
|  | Display data / relevant information in a manner that is easy to access and use |
|  | Post initial charts so they are visible in front of room |
|  | Consider specialty decor (adds to eventfulness and keeps kinesthetic participants engaged) |
|  | Place participant supplies |
|  |  |
| * **Prepare Yourself**
 |
|  | Rehearse the conversation in your head |
|  | Visualize yourself in the room facilitating the conversation successfully |
|  | Calm and center yourself before the meeting starts. Be in a good frame of mind |
|  | Write out all needed charts before the meeting starts:Purpose / Agenda / Instructions / Chart with any question whose answers will be documented / Arrange charts in order they will be used |
|  |  |
| **Follow Up** |
|  | Reflect on the conversation, the group and yourself (reflection tool) |
|  | Learn from the experience |
|  | Document meeting |
|  | Distribute notes - everyone knows their assignments and follow up activities |
|  | Hold periodic check-ins to make sure everyone is on track between meetings |
|  |  |

SNAP-Ed ToP Virtual Cohort - Heidi Kolbe & Nileen Verbeten May 8, 2017