# Facilitated Session Checklist

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| **Introduce the Session** | **Manage the Agenda** |
| Welcome the Participants | Open the Agenda Item |
| \_\_\_\_ Greet participants as they enter. | \_\_\_\_ Introduce the agenda step. |
| \_\_\_\_ Direct participants to pick up name tents. | \_\_\_\_ Describe the purpose of the item. |
| \_\_\_\_ Direct participants to their seats. | Explain Technique |
| \_\_\_\_ Direct observers to their seats. | \_\_\_\_ Explain the terminology. |
| \_\_\_\_ Offer refreshments. | \_\_\_\_ Perform “warm up” activity. |
| \_\_\_\_ Pass around attendance log. | Conduct Technique to Address Item |
| Make Introductions | \_\_\_\_ Apply techniques. |
| \_\_\_\_ Introduce session facilitator and documenters. | \_\_\_\_ Develop deliverables if required. |
| \_\_\_\_ Introduce project sponsor. | Document Consensus |
| \_\_\_\_ Introduce project manager. | \_\_\_\_ Document results. |
| \_\_\_\_ Introduce project team. | \_\_\_\_ Summarize conclusions reached. |
| \_\_\_\_ Have participants introduce themselves. | \_\_\_\_ Obtain closure on agenda item. |
| State the Purpose of the Meeting | Document Open Issues |
| \_\_\_\_ Have project sponsor express support. | \_\_\_\_ Post Action Items and Open Issues. |
| \_\_\_\_ Have project sponsor explain project scope and objectives.  \_\_\_\_ State the session goals and objectives. | \_\_\_\_ Determine target data for resolution. |
| \_\_\_\_ Determine who will take responsibility for each item. |
| Introduce the Agenda | Distribute Preliminary Documentation |
| \_\_\_\_ Post the agenda. | \_\_\_\_ Assemble and distribute for review. |
| \_\_\_\_ Briefly describe each agenda step. | \_\_\_\_ Review with group as needed. |
| \_\_\_\_ Review session evaluation approach. | Review Consensus |
| Review “Administrative” Information | \_\_\_\_ Obtain consensus from participants and project team. |
| \_\_\_\_ Explain lunch plans. |
| \_\_\_\_ Explain break schedule. |  |
| \_\_\_\_ Identify location of restrooms. | **Conclude the Session** |
| \_\_\_\_ Review arrangements for messages.  \_\_\_\_ Review final day schedule/participant departure.  \_\_\_\_ Review emergency procedures.  Explain Roles and Responsibilities  \_\_\_\_ Session facilitator  \_\_\_\_ Documenter  \_\_\_\_ Project Sponsor  \_\_\_\_ Project Manager  \_\_\_\_ Participants  \_\_\_\_ Observers  Explain the Ground Rules  \_\_\_\_ Post the ground rules.  \_\_\_\_ Explain importance of ground rules.  \_\_\_\_ Ask for additions or changes to ground rules.  \_\_\_\_ Check for consensus on ground rules. | Closing the Session  \_\_\_\_ Thank the participants for their hard work.  \_\_\_\_ Praise them for their involvement and accomplishments.  \_\_\_\_ Summarize the accomplishments.  \_\_\_\_ Obtain closing remarks from project sponsor.  \_\_\_\_ Ask project manager to explain the next steps and describe resulting documents, if any.  Complete Session Evaluation  \_\_\_\_ Distribute and collect evaluation forms.  Break Down the Room  \_\_\_\_ Remove and gather all flip-chart/whiteboard information.  \_\_\_\_ Remove all facilitation and personal materials.  \_\_\_\_ Coordinate room clean-up as applicable. |