

Roles in a Meeting

Convener

The convener is the person who calls the meeting. This person may be the leader of a group or manager of a project, or may have no real authority. Generally the convener works with the facilitator to set the agenda. The convener opens the meeting and then turns it over to the facilitator to lead so that he/she can participate in the discussion.

Facilitator

The facilitator is the neutral servant of a group. His/her purpose is to assist the group to (1) focus energy to achieve agreed upon group goals, (2) encourage participation by all members, (3) promote respect for individuals and their ideas, (4) prepare the agenda (with the convener) and make suggestions about process approaches.

Recorder

The recorder is also the neutral servant of the group. His/her role is to utilize the group memory to (1) capture the basic ideas of speakers, using the speaker's words and (2) to work with the group and the facilitator to support the group process.

Group Member

All other participants in a group are members. At times, the convener may become a group member following the opening of the meeting. Group members share responsibility with the other roles for the success of the meeting.

Facilitative Group Member

A facilitative group member is one who is able to help the group move through an inclusive and thorough process and accomplish its goals. Typically, this person clearly understands roles and responsibilities and he/she is able to use active listening and problem-solving skills to assist individuals and the group as a whole.

Other Possibilities:

- **Resource Person / Content Expert**

This person is available to the group to provide background and specialized information as it is needed for the group to proceed.

- **Timekeeper**

This is usually a member of the group who is appointed to help the facilitator keep track of the time allowed for specific parts of the agenda. Sometimes the recorder will take this responsibility.

- **Process Observer**

This is a member of the group who volunteers to refrain from active participation in the meeting and monitor the interaction of the group and the effectiveness of the processes that are used. The observer gives a report at the end of the meeting. This role can be very helpful as a group is trying to make its process more effective.

Facilitator Responsibilities from Start to Finish

Pre-meeting	<ul style="list-style-type: none"> ▪ Assist with agenda development ▪ Make sure participants are notified ▪ Assemble facilitation materials ▪ Decide on appropriate room arrangement
Beginning of Meeting	<ul style="list-style-type: none"> ▪ Promote participation ▪ Establish a positive, comfortable climate ▪ Make contract with group - define roles ▪ Establish group agreements ▪ Define meeting purpose /objectives ▪ Get agreement on time available ▪ Set context for discussion (e.g., "roadmap") ▪ Discuss processes to be used for: <i>information gathering - decision making - conflict resolution</i>
During Meeting	<ul style="list-style-type: none"> ▪ Minimize your own talking ▪ Avoid acting as expert ▪ Help the group stay on task ▪ Promote participation ▪ Model facilitative behavior ▪ Encourage and compliment ▪ Enforce group agreements as needed ▪ Suggest process steps as needed ▪ Use criticism constructively – avoid becoming defensive ▪ Work with recorder to develop "group memory"
At end of Meeting	<ul style="list-style-type: none"> ▪ Summarize outcomes ▪ Establish next steps and who is responsible ▪ Congratulate group on work accomplished ▪ Set next meeting (if needed) and define preliminary agenda ▪ Roll and label any flipcharts created ▪ Close meeting and straighten room
Post-meeting	<ul style="list-style-type: none"> ▪ Prepare notes, highlighting action items ▪ Distribute notes as needed ▪ Plan next meeting

Using an Agenda

Before the meeting begins, the facilitator or the convener will prepare an agenda for the meeting. The Agenda serves as a roadmap for the participants, letting them know how long the meeting will run, what the topics of discussion are, and what the desired outcomes of the session are. The agenda provides context throughout the meeting, by reminding participants where they are in the discussion, and frames the discussion, allowing the facilitator to help the group if the discussion begins to veer off topic. As a facilitator, you may work with an agenda in the following ways.

Prepare the Agenda This should be done before the meeting. You should consider the topics that need to be discussed, how much time should be allotted for each item, and what process you will use to achieve the desired outcome of the item. In addition, you should have the purpose of the meeting clearly stated in your mind (or on a big piece of flip chart paper) so that you can prepare to remind the group of why they are meeting.

Time	Topic	Process	Desired Outcome
What is the sequence of topics? How much time can you allot to each?	What items need to be discussed?	How will these items be discussed? Who will be involved?	What is the goal of having this on the agenda?

Write up the Agenda before the meeting begins, so that everyone will be able to see it, and so that you'll have something to refer to. It should include date and both start and end times, as well as the major topics to be discussed, and how much time the group will spend on any particular topic. Post the agenda in a location visible to everyone.

AGENDA	
6:00 - 8:00 PM	
6:00 PM	Welcome and Introductions Agenda Review
7:00	Topic 1 Topic 2 Topic 3
8:00	Summary & Review of Next Steps Process Evaluation Thanks and Close

Review the Agenda with the group at the beginning of the meeting. Use this as an opportunity to check in with the group to confirm that this is what they expected to be doing during the meeting, and ask for any additions or modifications.

Use the Agenda During the meeting you can use the agenda to help keep the group focused about where they are and what they'll be doing next. You can also use the agenda to help bring the group back on track, by checking in with them about the time, or by asking if what they are currently discussing relates to the agenda. Agendas are also great tools to help people feel like they are accomplishing what they set out to do.

About Group Agreements

- Also known as “ground rules,” group agreements:
- Set minimal standards of behavior in a meeting... or articulate goals for improved behavior.
- Should ALWAYS be used in some form... the one time you skip them, they will be absolutely necessary
- Should be introduced as early as possible on the agenda, since disrespectful behavior can start anytime.
- Should be discussed if they are new to the group. For example, if the ground rule is “speak respectfully,” encourage discussion and buy-in by asking “What does ‘respectful’ look like for you?”
- Should be written out and posted in a visible location.
- Should be thought out when the agenda is being designed... but must be approved by the group at the beginning of the meeting. Make eye contact with each group member and ask for nods.
- Can be modified by the facilitator or a group member during the course of the meeting if necessary but changes must be approved by the group.
- Should be enforced carefully. General statements are often enough to get a group back on track. Examples include:
 1. “Let’s remember the group agreements”
 2. “We all agreed not to be disrespectful”
 3. “We’re having trouble with interruptions”
 4. or simply a gesture to the posted group agreements

PCRC frequently uses the some or all of the following group agreements:

- Speak respectfully
- Speak one at a time
- Listen for new information
- Take responsibility for your own participation
- Allow the facilitator to guide the process