

# Checklist for Facilitating Meetings and Professional Development

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## Opening

- How will I know who is in the room and what they're bringing in with them—as far as their backgrounds, experiences, and feelings about the session? How do I get that information?
- How do I communicate the session's objectives and activities?
- How do I share where these objectives and activities come from?
- How do they see how these objectives are relevant to their work and where the learning will be applicable?
- How do I communicate expectations for behavior, norms, and engagement?
- Are there any norms that need to be requested (confidentiality?) and agreed on?
- Are there any other decision-making moments in the day? If so, how will they be decided?
- How do I make this an emotionally safe space?
- How do I show up as a compassionate listener?
- How do I communicate what to do with questions, concerns, and requests? What structures capture these?
- How do I help participants get grounded and present for the session's learning?

## Pacing and Tone

- How are participants seated? Random groups or predetermined? Can these change during the session?
- Do participants move physically throughout the day? Do people get up at least every 60 minutes?
- Does any segment go for more than 20 minutes without a shift?
- If participants don't know each other, what do they need to know in the beginning? (Names?)

## Collaboration

- Are there structures for participants to learn from each other?
- How often do they talk to each other? How much of that talk is structured and how much is open?
- What is the purpose for each talk time (e.g., meaning making, story telling, reflection, planning)?
- Are meaning-making talk times varied in the numbers of participants who are engaged? Are there opportunities for dyads, pair shares, trios, small groups, whole group?
- Are there opportunities to hear from each other in a nonverbal way (e.g., a chalk talk)?



## Exhibit 11.1

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- Are there opportunities to role-play?
- Can participants coach each other? How do I set this up to be safe?
- Is there a “problem” that participants can solve together?
- Do participants have a chance to tell their stories? Does some of the talk invite personal stories?

### Learning

- When do participants have choice during the day? Where do they get to direct their learning?
- How will participants remember what they learn?
- How can they have some experiences during the same day when they can apply their learning?
- Are there different ways for participants to experience input (e.g., reading, listening, watching a video or role-play)?
- How many visuals am I using? Are there a few memorable visuals?
- How many stories will I tell? When will I tell stories? For what purpose?
- Is there an opportunity to visualize some piece of the new learning?
- Can metaphor, simile, analogy be incorporated as a way to make meaning or remember learning?
- When can a graphic organizer be used?
- Are there opportunities for participants to write?
- Is there an opportunity to incorporate drawing?
- Are participants given an opportunity after every input piece to make meaning and capture learning?

### Shifting Energies

- Are there moments when we might laugh? How can I plan for laughter?
- Is there an opportunity to include a video?
- When could I play music?
- Can I use quotes, a short story, or poetry to engage participants in reflection and discussion?
- What can I do after lunch to avoid the sleepy slumber?
- Is there an opportunity for a walk and talk?

### Closing

- How do I solicit the support that participants need to continue their learning?
- How will participants recognize and reflect on their learning during the day?
- How will they be able to assess how much they’ve learned?
- How will participants offer me feedback?
- How will I close the day and appreciate their participation?
- How can participants appreciate each other?

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