

C.6: Checklist – Meeting Facilitation

Use this checklist to help facilitate active, inclusive stakeholder discussions on responsible data use and privacy.

TONE

- Open discussions with a friendly, welcoming tone. End on a positive, optimistic note.
- Speak with simple and direct language.
- Display energy.
- Message that diversity of voices is an asset.
- Be attentive while others are speaking; participants should be the center of attention, not facilitators.
- Direct questions to experts or other participants, to avoid the impression of being the authority in the room.
- Stay neutral; facilitators should not be defensive or argumentative.

SETTING THE STAGE

- Be clear who is running the meeting and what its goal is, including what parts of the IDS use case can and cannot be impacted by stakeholders' input.
- Introduce all participants.
- Let everyone know the meeting rules (e.g., when there will be opportunities to speak, what is on and off topic, whether the meeting will be recorded and how such recordings will be used, etc.).

MANAGING DISCUSSION

- Check in with participants to see how the discussion is going.
- Keep track of key ideas. (A white board, flip pad, or digital tracker may be helpful).
- Have a range of discussion tools on hand, in case one approach doesn't work or a new direction is needed.
- Assertively (but not aggressively) manage conflicts so that everyone has an opportunity to be heard and the discussion stays on topic.
- Keep the discussion on topic, and have a way to capture off topic comments so that they can be addressed at another time.
- Bring closure to the discussion, and end with clear steps for the next meeting.

ENCOURAGING DISCUSSION

- Keep explanations as simple as possible; avoid acronyms and technical terms.
- Treat all participants as equals.
- Don't let a few people dominate the whole discussion.
- Solicit comments from those who haven't spoken yet, or who might have been spoken over.
- Consider ways to encourage a range of participants, such as written comment/question cards, small group break outs, or one-on-one outreach.
- Allow silence to be comfortable. If there is no response to a question, wait 20-30 seconds before prompting or restating the question.
- Tell participants that all perspectives are welcome, and that different points of view are valuable.

FOLLOW UP

- Ensure that participants feel ownership for what has been achieved.
- Ask for feedback about the meeting process and use it to improve future meetings.
- Follow up with those who might be disappointed with decisions you made and encourage them to stay involved.
- Prepare and distribute a meeting summary, including any decisions, action items, and future meetings, and identify a specific contact person for participants to reach out to with additional questions or comments.