Perkins V Consultation Resource

Meeting Facilitation Guidance

This guide provides notes and recommendations for facilitating the Perkins V stakeholder outreach meetings for the comprehensive local needs assessment process.

Contents

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Facilitation Tools and Resources

The exact tools and resources will vary based on a number of factors (e.g., district size, room layout, expected number of participants, agenda), but the below table details the most common facilitation tool and resources that you should consider in your planning process.

Tool/Resource	Explanation
Flip Chart and Flip Chart Paper	A flip chart in the front of the room is must-have item for most facilitated conversations. This allows you to capture key points, make lists, and document the meeting. Flip chart paper with the sticky backing allows you to easily post lists around the room.
Note Cards or Sticky Notes	Note cards or sticky notes are a great tool for quickly capturing participant feedback on a question. These tend to work well for activities where you want lots of feedback from each individual participant. The Institute of Government recommends keeping these items close by during a facilitated meeting as you can use them to pivot if you need to gather additional feedback or change from discussion to individual work.
Blank Paper	Each table should have blank paper in the center. Some people will use this for note taking and other documentation purposes. We recommend using colored paper so it easily stands out from the agenda and other printed documents.
Agenda	Each participant should have a copy of the agenda. See the meeting 1 and meeting 2 sample agendas for examples. The agenda serves as the roadmap for the meeting and helps participants to stay engaged and know what to expect. You can also use the backside of the agenda for an activity (i.e., flip over your agenda and write down…).
Pens and Markers	Each table should have some writing utensils on it for participants to use throughout the meeting. We recommend several pens and markers. The pens will be used for notetaking and the markers for making name tents and writing on flip charts.

Presentations and Handouts	You will likely have a PowerPoint presentation/s that will support the meeting. You may also have handouts that you want to distribute to meeting participants.
Cardstock	Cardstock can be used to make name tents for each participant. We recommend using 110 pound card stock as it is more firm and will stand up better during the meeting. You can pre-print these if you have a good list of participants, but for a meeting like this we recommend that participants create a name tent as they find a seat.

Planning for Facilitation

An effective facilitation requires planning in advance of the meeting. Depending on the agenda, size, and scope, you may spend significantly more time planning the meeting than the meeting length. Proper planning will help ensure seamless meetings.

1) Stakeholder Outreach: You cannot have an effective consultation session if no one shows up. Your stakeholders are busy people and likely have multiple competing priorities each day. You will need to reach out to them early and through several different mediums (e.g., email, phone, in-person). You may also want to leverage intermediaries (e.g., economic development, chambers, elected officials, community leaders) in your community to help identify stakeholders, build interest, and help stakeholders understand the importance of these meetings.

2) Facilitation Plan: An effective facilitation requires a plan behind the agenda that details who is responsible for each part of the agenda, how much time it is expected to take, what they will do, and what is required to support this. Sometimes this is referred to as a "run of show" document. See the meeting 1 and 2 guides for support on developing the facilitation plan. See Appendix A for a sample facilitation plan. A blank facilitation plan template is also available with the local consultation resources.

   For example, if you are covering one the Perkins V elements, the facilitation plan should detail how much time you expect that agenda item to take, who will be giving the element overview presentation, what questions you plan to ask, and how you plan to collect the feedback (e.g., flip chart, round robin, note cards, large group discussion).

3) Room Layout: The layout of the room can impact the success of the listening session. The typical classroom or auditorium set-up is not ideal for a consultation or listening session. You should look for a space with flexible furniture that can be re-arranged into small conversation groups (5-8 people). Round tables or rectangular tables formed into pods works well for this. Organizing the room into small conversation groups will help to support the facilitation by allowing for multiple conversations to happen at the same time. The room should be big enough to spread pods out so groups can hear tablemates but not so big as to allow people to drift off or require shouting (like a gym or cafeteria). The front of the room should have a screen for PowerPoint presentations and a flip chart for capturing notes.

4) <u>Event Support</u>: You will likely need several staff members to help execute an effective facilitation.

   Meeting roles to consider include:

   - District level official: You should have a district level official (e.g., superintendent, deputy superintendent for teaching and learning) welcome the group and close the meeting. It is also important for district officials to hear to feedback from your stakeholders.
   - Registration: You should have a sign-in table to capture the names and information of each person participating in the event. You could create a sign-in list or have sign-in cards. You may also want to place any handouts at this table so that participants can pick them up on their way in. At least one person should manage the registration table.
   - Note Taker: The listening session should have a dedicated note taker. This person will be responsible for capturing the key points discussed during the meeting.
   - Facilitator Assistant: If you are expecting a large group, it may be helpful to have a facilitator assistant or co-facilitator. This person can help work with several of the tables during the various parts of the meeting to help keep them on track, answer questions, takes notes on the flip chart, or any other kind of support required.
   - Presenter: The presenter/s will be responsible for covering any of the planned material during the meeting (e.g., Perkins V overview, labor market data sharing, etc.).

     Note: Some of these roles may potentially be combined. You may also be able to use students to assist with some roles during the meeting.

Facilitation Tips

Consider the five tips below as you plan and execute the listening sessions.

1) <u>Keep it Simple</u>: Do not over think the consultation sessions. The goal of these sessions is to collect input from various stakeholders. You need to create a space for participants to share their feedback in an organized manner.

2) <u>Small Groups Work Great</u>: Many times we think about consultation and listening sessions, we think about large group discussions. While there is certainly a place for large group discussions, this is also the most difficult type of meeting to facilitate. With a large group discussion, participants may have a difficult time stating their point of view, may feel like one person is dominating the conversation, or may veer off-topic.

   Small group discussion tends to work well for this type of meeting format. Instead of one large group discussion, you will have participants react to the presentation or answer the question in their tabletop conversation group. The group will have a conversation and then a spokesperson will summarize their key discussion points.

3) <u>Listen</u>: The consultation session is about <u>**listening**</u>. The goal of the time is to hear the input from stakeholders so that is can be used to influence your local application. The facilitator is there to help manage the meeting, but you are not a participant. If conversations come up that are not relevant to Perkins or the topic at hand feel free to use a parking lot to list things that need some attention offline or at another time.

4) <u>Your Stakeholders aren't CTAE Experts</u>: Remember that your stakeholders are not CTAE experts. You should avoid using acronyms or other non-common terminology. You will need to educate your stakeholders on CTAE and Perkins V so they can best provide you input and direction. If you find yourself using acronyms a lot try putting together a handout that helps explain them for reference.

5) <u>Ground Rules</u>: It may be helpful to have a few simple ground rules for the consultation sessions. These can be shared at the start of the meeting to help set expectations for how the meeting will proceed.

<u>**Sample Ground Rules**</u>

- <u>Listen</u>
- <u>Respect</u>
- <u>Solutions Focused</u>
- <u>One Speaker at a Time</u>
- <u>Represent your Peers</u>

Appendix A. Sample Facilitation Plan

Facilitation Plan

Event Title:____ **Date:**____

Meeting Goals:	
Desired Outcomes:	
Facility and Material Needs:	**Flexible seating for 40 participants (rounds preferred). Laptop computer and project. A sign-in table will be in the back of the room near the entrance.**

Time	Agenda Item	Notes/Process	Materials Required
9:00-9:10AM	**Welcome and Introductions** *Dr. Jones*	Dr. Jones will welcome the group the listening session and explain the purpose of the meeting. He will ask that participants introduce themselves to their tablemates and make a name tent.	-Cardstock and markers will be pre-set on the table
9:10AM-9:20AM	**Perkins V Overview** *Mr. Brown*	Mr. Brown (CTAE Director) will give a short overview of Perkins V and how it impacts the district. There will be time for 1-2 questions.	-PowerPoint presentation loaded on the laptop
9:20AM-9:40AM	**Review of Labor Market Information Data** *Ms. Nickels*	Ms. Nickels (County Economic Development Director) will present seven slides covering key pieces of labor market information that will help guide the alignment and size, scope, and quality conversations.	-PowerPoint presentation loaded on the laptop -Copies of the PowerPoint slides to pass out to participants

9:40AM-10:05AM	**Alignment Conversation** ***Facilitated by Mr. Brown***	This portion of the agenda is seeking input from stakeholders on the alignment between programs offered and the labor market needs of your community, region, and state now and in future years. Groups will be asked to discuss the following two questions. 1) Based on the data shared and your experience, how aligned are our programs to the local, regional, and state labor market needs? 2) What additional programs might best help our district to align to labor market needs? Groups will discuss the first question for 7 minutes and then we will have a quick round-robin session to hear what some of the key items discussed at each table were. We will repeat a similar process with the second question.	-CTAE program offering handout -Note cards and scrap paper will be set on the table before the event
		END OF SAMPLE The facilitation plan would continue to encompass the entire meeting	