

Facilitator

Guide and structure the discussion so that it covers the relevant topics and participants feel progress has been made

Collect agenda items, assign any action items, and move discussion on to the next agenda item

"What are some topics people want to be sure to hit during this discussion?"

"That's an important discussion, but I don't think we can do it justice in this session."

"Any volunteers to follow up on that task?"

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Note-taker

Your job is to record agenda items, areas of agreement and disagreement, action items, etc. Several people can take notes at once!

[YOUR NOTES CREATION AND SHARING INSTRUCTIONS HERE, e.g. Create a Google Doc, make it world-editable, and add a link and description in the session notes document:]

[SESSION NOTES URL HERE]

[CONFIDENTIALITY INFO, e.g. Don't include anyone's names or identifying details without explicit verbal permission.]

"Could you repeat that again, please?"

"Sorry, how do you spell that?"

"What was the final decision?"

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Timekeeper

Estimate the time needed for each agenda item and interrupt if people are going seriously over time

Give a warning at halfway and 5-10 minutes left

At the end of the session, interrupt and tell people the session is officially over (if people want to continue the discussion, ask them to move out of the room)

"I just want to do a time check, we have 10 minutes left and 3 agenda items to go"

"I hate to interrupt you all, but we are out of time and need to give back the room."

"This is great after-session discussion, could we move it into the hallway?"

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Gatekeeper

Politely interrupt people who have been talking too long

A few times a session, stop and directly invite people who haven't said anything yet to speak

Redirect discussion back on-topic if it gets derailed

"Excuse me, I'd like to give some other folks a chance to speak now."

"You look thoughtful, would you like to share any thoughts with us?"

"This is an interesting discussion, but I'd like to return to the original question."

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