

Facilitator's Outline for Live Facilitated Meetings

1. Thank yous to those attending
2. In PowerPoint template discussed in [Stages 3-6 Step 1](#), go to slide with the daily goal. The instructions, slide descriptions, and some talking points are in the notes areas of the slides in this template
3. Go to next slide in the template with the correct SWOT topic for the day (Strengths, Weaknesses, Opportunities, or Threats)
4. Review ideas from brainstorming survey: Give participants a few minutes to **SILENTLY** review the ideas on the slide.
 - a. Check in at 2 minutes of quiet review to see if anyone needs more time
 - b. If applicable, check in at 5 min to see if need more time
 - c. Move on to next step **ONLY** if everyone is in agreement that they are done reviewing the ideas
 - d. Ask participants *Are we ok with moving on to the next step of the process?*
5. Adding **NEW** brainstorming ideas: Ask the participants *After reviewing all of the ideas, are there any NEW ones you want to add? Remember we only want new ideas that have not already been identified and each new idea must have a noun and a verb.*
 - a. Keep asking until no more new ideas are provided
 - b. Ask participants *Are we ok with moving on to the next step of the process?*
6. Clarifying brainstorming ideas: Ask the participants *Are there any ideas up here you want clarification on?*
 - a. The person giving clarification on the idea does not need to be the one who submitted the idea
 - b. You can change idea wording IF the **ALL** of the participants are in agreement – need to check in with them
 - c. Ask participants *Are we ok with moving on to the next step of the process?*
7. Affinity Diagramming: Explain to participants *Now we are going to group like ideas*
 - a. Share the instructions for this part of the process:
Each person is going to have a chance to group the ideas you see on this screen. This activity is done in silence so no talking. I will remind you of this rule if anyone starts talking. We will start with (however you want to start such as alphabetically).
If the facilitator is also a participant, we found it useful for her/him to have already grouped the ideas. It saves time and reduces the cognitive burden of the other participants. If that is the case, here is a suggestion of what you can say next: *Andrea has already grouped the ideas and now we will start with XX. When you are ready, please use the request control of the screen so I can give it to you. When you are done grouping the ideas, let me know and can release your control over the screen.*
 - b. Once last person has had their turn grouping ideas ask the participants: *Is there anyone who wants to move any ideas?*
 - c. Keep checking in to see if someone wants to move any ideas until everyone seems fine with how they end up
 - d. Verify with everyone that they are fine with the current groupings
 - e. Ask participants *Are we ok with moving on to the next step of the process?*
8. Titles/headers: Explain to participants *Now we are going to develop titles or headers for each group*
 - a. Check to see if there is any one group they want to start with first
 - b. Ask the participants *What do we want to call this group?* If something is suggested, check back with the participants that they are ok with what was suggested
 - c. Repeat 8.a. – 8.b until all of the groups have a title
9. Thank participants and let them know what the next steps will be