**Facilitation Guide**

*Purpose:* (What is the purpose of the meeting?)

*Context:* *(How does this meeting fit the goals of the unit/organization? Is this a stand-alone meeting? Part of a larger effort? Has this group met on this topic before?)*

*Topic(s)*

*: (**What will be covered in the meeting? Note: this is not the agenda, but will be used to build an agenda)*

*Out of scope (or sideboards): (**What is outside the intent of the meeting; or what are the limits that the group should not exceed?)*

*Goal(s): (**What will success look like?)*

*Objectives:* *(What are the measurable outcomes from this meeting?)*

*Potential issues: (Are there any sensitive topics or hot button items to be aware of?)*

*Decision-making process: (How will decisions be made? Consensus, majority, decide and report, decide and recommend, etc.)*

*Deliverable(s): (What, if any, products are expected to come out of the meeting, and who is responsible for them?)*

*Participation: (List the names and roles of meeting participants)*

Leader:

Facilitator:

Recorder:

Participants:

Stakeholders:

*(Who might be impacted by what comes out of the meeting?)*

*Preparation: (What needs to happen before the meeting? Who will be responsible?)*

*Follow-up Responsibilities: (Is any follow-up expected, and if so, who is responsible? What is the timeline?)*

*Logistics: (Room size & arrangement, supplies, equipment, refreshments/meals; who is responsible?)*

## 5 Why’s

Problem:

**Why?**

**Why?**

**Why?**

**Why?**

**Why?**