

TOOL

Check List for Facilitating Meetings and Professional Development



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Check List for Facilitating Meetings and Professional Development

Purpose

This tool supports facilitators in designing and leading meetings and professional learning experiences that are engaging, purposeful, and responsive to participants' needs. It offers a comprehensive set of considerations to help you plan for both the structure and the experience of learning.

When to Use

Use this tool when planning a meeting or professional development session, and again afterward to reflect on what worked and what you might adjust. It is especially useful when you want to strengthen engagement, pacing, collaboration, and overall impact.

How to Use It

Review the checklist in sections (Opening, Pacing and Tone, Collaboration, Learning, Shifting Energies, and Closing) and identify the elements most relevant to your session. You don't need to address every question—use this as a guide to spark intentional planning and reflection. Over time, you'll internalize these considerations and apply them fluidly as you design and facilitate learning experiences.

Check List for Facilitating Meetings and Professional Development

Opening

- How will I know who is in the room and what they're bringing in with them—as far as their backgrounds, experiences, and feelings about the session? How do I get that information?
- How do I communicate the session's objectives and activities?
- How do I share where these objectives and activities come from?
- How do they see how these objectives are relevant to their work and where the learning will be applicable?
- How do I communicate expectations for behavior, norms, and engagement?
- Are there any norms that need to be requested (confidentiality?) and agreed on?
- Are there any other decision-making moments in the day? If so, how will they be decided?
- How do I make this an emotionally safe space?
- How do I show up as a compassionate listener?
- How do I communicate what to do with questions, concerns, requests? What structures capture these?
- How do I help participants get grounded and present for the session's learning?

Pacing and Tone

- How are participants seated? Random groups or predetermined? Can these change during the session?
- Do participants move physically throughout the day? Do people get up at least every 60 minutes?
- Does any segment go for more than 20 minutes without a shift?
- If participants don't know each other, what do they need to know in the beginning (Names?)

Collaboration

- Are there structures for participants to learn from each other?
- How often do they talk to each other? How much of that talk is structured and how much is open?
- What is the purpose for each talk-time? (Meaning making, story telling, reflection, planning, etc.)
- Are meaning-making talk times varied in the numbers of participants who are engaged? Are there opportunities for dyads, pair-shares, trios, small groups, whole group?
- Are there opportunities to hear from each other in a non-verbal way? (Such as a chalk-talk)
- Are there opportunities to role play?
- Can participants coach each other? How do I set this up to be safe?
- Is there a "problem" that participants can solve together?
- Do participants have a chance to tell their stories? Does some of the talk invite personal stories?

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Learning

- When do participants have choice during the day? Where do they get to direct their learning?
- How will participants remember what they learn?
- How can they have some experiences during the same day when they can apply their learning?
- Are there different ways for participants to experience input? (Reading, listening, watching a video or role play)
- How many visuals am I using? Are there a few memorable visuals?
- How many stories will I tell? When will I tell stories? For what purpose?
- Is there an opportunity to visualize some piece of the new learning?
- Can metaphor, simile, or analogy be incorporated as a way to make meaning or remember learning?
- When can a graphic organizer be used?
- Are there opportunities for participants to write?
- Is there an opportunity to incorporate drawing?
- Are participants given an opportunity after every input piece to make meaning and capture learning?

Shifting Energies

- Are there moments when we might laugh? How can I plan for laughter?
- Is there an opportunity to include a video?
- When could I play music?
- Can I use quotes, a short story, or poetry to engage participants in reflection and discussion?
- What can I do after lunch to avoid the sleepy slumber?
- Is there an opportunity for a walk and talk?

Closing

- How do I solicit the support that participants need in order to continue their learning?
- How will participants recognize and reflect on their learning during the day?
- How will they be able to assess how much they've learned?
- How will participants offer me feedback?
- How will I close the day and appreciate their participation?
- How can participants appreciate each other?

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