# Meeting Roles and Tools



Shared Leadership is essential to team development, fostering buy-in and ownership for the team's work, and improving alliances for those in leadership roles by increasing empathy from shared experiences. At a minimum, a team should rotate four roles: ***Facilitator, Timekeeper, Recorder & Process Checker***. Consider also rotating locations (through classrooms/offices) to further make a team's practice public.

**The Facilitator** is responsible for the agenda – ensuring the intended flow and goals within time frames are achieved. The Facilitator also considers participants, reading the room and making adjustments to support the group to best engage the intended content. The Facilitator openly collaborates with other shared leadership roles (*i.e. asking the Timekeeper for a 2′ warning, asking the Process Checker to check in at pertinent times, asking the Recorder to highlight a particular piece*) to better support this responsibility to balance agenda fidelity and responsiveness to participants. If leading an agenda item, the Facilitator may identify another facilitator for that section of the agenda. Prior to a meeting, the Facilitator is checks in with the person responsible for the agenda in order to review the connection between the agenda and goals, consider special circumstances, and receive support and coaching. The Facilitator should check in with each of the other shared leadership roles to direct them in a manner to support successful facilitation.

**The Timekeeper** holistically holds time for a meeting as a whole as well as for and within individual agenda items (i.e. individual/ group report outs), ensuring prompt start and end times. When timing individuals for structured sharing such as a go-round, a timer or a simple "thank you" effectively informs an individual that time is up. The Timekeeper periodically informs members how much time is allotted or remaining, and when necessary negotiates adjustments (with the Facilitator) if an agenda item runs long or short. The Timekeeper reminds the group of the impact a change in time has on other agenda items or the meeting as a whole (i.e. *when extending one item, do we shorten other items or extend the meeting*?)

**The Recorder** records a meeting's major components – attendance (including time for those arriving late or leaving early), key issues, questions, decisions and actions. The Recorder submits and distributes final minutes using established method and timeline to assure access for those absent or to clarify questions in the future. The Recorder checks with participants to ensure accurate recording (i.e. "*Let me read back what I just wrote to make sure I got it right*"). The Recorder does not also "chart" - the Facilitator or volunteer does.

**The Process Checker** observes and reports on group processes, dynamics and patterns in relation to the agreed upon norms or a related focus (i.e. tracking discourse 2 quotes as a subcategory of trust & risk taking). Affirming behaviors that are consistent with the norms and naming behaviors that appear to violate them, data can be qualitative (i.e. "*Some examples of where we were & were not respectful were…*") as well as quantitative (i.e. "*Of the 25 comments during the discussion on race, 18 came from just 2 people – 1 white man & 1 white female*"). While observations may vary meeting to meeting, the Process Checker always should consider patterns of participation – in the context of the agenda. (i.e. *Who talks? How long? How often? When? Who is (not) participating? How does the group make decisions about the agenda? How do demographics relate to any of this data?*) The Process Checker normally shares observations and questions at the end of the meeting but also may interrupt or be invited to share a "process check" at key times within the meeting for which s/he simply and objectively shares related observations and returns the floor to the Facilitator. The Process Checker is expected to maintain objectivity and should refrain from offering individual opinions and experiences that may not be reflective of the larger group dynamic. Analysis beyond that which is supported by observational data can be offered in the form of probing questions.

**Participants** ultimately are the most important influence on a meeting's success. Formally sharing responsibility through shared leadership over time builds capacity for a community to effectively share in these responsibilities, regardless of which individually is assigned to the role. *Suggestion*: At the end of each meeting, those with assigned roles debrief for 15 minutes reflecting on their roles and learning, (i.e. *What did you experience & learn about and as a result of your role? What suggestions do you have for future meetings?)* If the team is no larger than the assigned roles, add this reflection to the process check.