Planning Effective Meetings

Bonner Curriculum

Overview:
It's no secret that community involvement and projects require lots of meetings. A meeting can make or break the planning process for a project, can inspire people to work hard or help to decide to tune out, and can help build an inclusive community or alienate people. This workshop provides a basic overview for how to plan an effective meeting. It introduces participants to considerations of planning agendas, structuring information, and designing activities for meetings. It teaches participants how to use structure to plan and run meetings that are purposeful and guide a group to achieve its goals.

Category:
Project planning and management; programming; facilitation

Level:
Suitable for all levels, but geared toward training participants who will themselves plan and run meetings with other groups

Recommended Bonner Sequence:
This workshop could be used at any time during the Bonner experience, but may be most suitable for during sophomore or junior years. It can be used in conjunction with building students' skills in diversity awareness (sophomore baseline), because it helps students explore leadership and personal style dimensions of diversity.

expectation	explore	experience	example	expertise
		♥	♥	

VALUES: ALL - community engagement, community building

Type:
Series of activities introducing key concepts and steps with the opportunity for application; this may be conducted as a training or provided and followed up through coaching

Focus or Goals of this Guide:

Introduce participants to types of meetings and planning considerations

Introduce participants to tools in how to create agendas and programming for meetings

Materials:

Copies of included handouts
Participants should have writing instruments and paper
Flip chart, markers, and stand

How to Do/Brief Outline:

This session is mainly organized around leading participants through a set of planning guidelines and steps for planning effective meetings. It will be helpful if participants can actually identify a real meeting that they need to plan in the near future, so that this workshop is particularly relevant and provides a chance for application of ideas.

The outline for this session as for a 1.5 to 2-hour workshop that has the following parts:

1. Warm Up   suggested time 15-20 minutes
2. Why Meetings Matter   suggested time 5-10 minutes
3. Appropriate Decisions for the Situation   suggested time 20 minutes
4. Types of Typical Meetings   suggested time 15 minutes
5. Work through Meeting Planning Steps   suggested time 30-40 minutes
6. Posting Agendas and Closing   suggested time 5 minutes

Part 1) Warm Up: Meeting Mishaps and Faux Pas
Suggested time: 15-20 minutes

Have people take a few moments to think to themselves and jot down their responses to the following prompts:

Recall one of the worst meetings you ever went to. What, specifically, made it so horrible?
Recall a meeting you have facilitated that didn't go as well as you hoped; what were some of the things that you did that didn't work?
Imagine a meeting you will be facilitating soon that you are concerned about; what specifically are the sticky points you are worried about?

After people have had time to think of their responses, get the group to focus. On a flip chart paper centrally located, write "Meeting Mishaps." Now, ask participants to share their insights about the ineffective meetings. For example, you might start by sharing one like "no one knew why they were there," "started an hour late," or "no facilitator – people fought the entire time."

Get a number of the group's ideas up there. Some people may share some brief stories, but also make sure you guide people to summarize the issue they encountered.

Then, shift the group to the second question, writing "Facilitator's Faux Pas" on the top of another sheet of flip chart paper. Again, invite some people to share their insights on their experiences or imagined challenges. For example, you might start by sharing one of your own experiences and insights, such as "Didn't have the right people at the meeting to make the decision – frustrated participants," or "Aimless meeting – didn't have a plan."

The main purpose of this warm up is to get people thinking about the things that make meetings go well or badly. As people have noted these not-so-effective things, you can either lead them into another brainstorm of effective elements of meetings or pull them out of the comments, noting them such as:

> Effective meetings = good planning
> People who are there need to be there and people who need to be there are there
> Clear purpose
> Activities that are appropriate to the purpose
> Start and end on time

Part 2) Why Meetings Matter
Suggested time: 10 minutes

Present a basic working definition of a meeting:

> Q: What's a meeting?
> A: A meeting is any time two or more people come together to give or gather information, take action, plan, problem solve, and make decisions.

Present the following facts to people

> There are more than 11 million meetings held each year in the United States alone.
> The "higher up" you are in an organizational or system's infrastructure, the more time you spend in meetings. On average, so-called middle management spends 35 percent of their time in meetings, while upper-level management spends 50 percent of their time in meetings.
> Most organizations spend 7-15 percent of their personnel resources on meetings.

So, even though we often hear, "Oh another meeting; I'll never get my work done!" there is a way to make meetings a place where good work happens.

This workshop will include some helpful frameworks and tools for planning effective meetings.

Part 3) Appropriate Decision Making Approach

Suggested time: 20 minutes

Use one of the participants' earlier comments, if they connect, to introduce a foundational idea for meeting planning — MEETING PARTICIPANTS NEED TO KNOW WHAT KIND OF INPUT THEY SHOULD GIVE.

You could introduce this topic through the following examples:

> Have you ever been in a meeting where the facilitator is asking for your input or opinion and you give it, later to be scolded by the facilitator, your supervisor, or someone else who says, "What you said wasn't appropriate – you need to get with the team" or something to that effect that tells you that your understanding of the decision-making process and the facilitations didn't match?
> Have you ever been the facilitator of a meeting and had participants respond in a way that makes you feel like, "why is that person being such a jerk and trying to derail my meeting; do they understand that this decision needs to be made and I need their support?"

In these and other situations, the problem may just be that people have failed to clarify what is the decision-making process and who is involved.
To deal with this, utilize this framework to determine the
APPROPRIATE DECISION-MAKING APPROACH.

1. Pass out handout (see end).

Present contents of handout: APPROPRIATE DECISION-MAKING APPROACH.

1. You need to determine who should be and is involved on a particular project, outcome, or goal. This information is linked to who should be at the meeting (or how many different meetings you will need to have, if that group of stakeholders is too big for one meeting or works in different groups). It is critical to assigning planning roles.

Framework:

Type of Approach	Example
Delegate with given expectations	"Joseph, Greg, and Marta are going to figure out how to deploy volunteers for the big service day event and then inform us. We will follow their plan."
Consensus	"We have gotten approval to do the mural in only four colors. We need to all agree on what the four colors will be."
Gather input from team/group and decide	"We need to do a presentation to the campus advisory board at the end of the month. I would like to know what all of you think that we should cover. I'll design the

Gather input from individuals and decide	outline based on your input." "I've gathered everyone's survey about your individual preferences for the contents of this month's training day and come up with a final list from which we can vote."
Decide and announce	"This is our only opportunity to meet with the Mayor, so we are going to do it."

Review each of the types of decision-making and their considerations.

Then, ask the group to work together to generate their responses to what the types of decision-making that would work well or be appropriate to the following scenarios. For each scenario, note the pros and cons of the levels that participants think could work:

Scenario 1:

A highly functional small working team in which each person has clearly defined roles and often works as the leader/manager of another group or team. For example a group of staff administrators who each run a different campus program, or a group of student leaders who each coordinates the tutoring program at a different school. In this case, the group is meeting to plan an end-of-the-year celebration one month away.

> Response – any of the types could work, but consensus or decide and announce may be inappropriate to the group and task. Choice would be based on other constraints of time, resources, etc.

Scenario 2:

A group of volunteers who work at a particular site are asked by their coordinator to come up with no more than 3 things that the program should consider doing to improve volunteer retention at the site. The meeting is part of this process.

> Response – all but decide and announce would be appropriate. Pros of delegate are reinforces trust, taps on areas of expertise, inclusive but structured, can be quicker. Pros of consensus is that the entire group has to agree to the three and forces careful decision-making. Pros of input from group is inclusive but speedy, could be done in one meeting. Pros of input from individuals is democratic, inclusive, can have clear steps.

Generate another scenario if necessary. If you think people get the idea, move on.

Part 4) Work Through Meeting Planning Steps
Suggested time 40 minutes

Pass out the stapled packets of multiple page handouts (Steps to Meeting Planning) covering steps to planning meetings. These are found at the end of this trainer guide.

The next portion of this workshop is to really work through these steps with people. Explain that each person needs to actually identify a meeting that he or she needs to plan, because people will have the opportunity to do so as they go through these guidelines.

Give everyone a minute to think and take 3-5 examples from the group.

For each step:

1. Explain the idea
2. Provide an example, using your own meeting planning idea. Do this up-front, using a flip chart to record in large print.
3. Give participants the chance to work through the idea, responding to the prompt for each step. Take examples from participants. Take questions and provide responses or use the group to do so.
4. Move to the next step.
5. After you have worked through all of the steps, hand out the Agenda Template and the Sample Agenda. Briefly review the contents of each. Then, have people take a blank sheet of paper and put together their final Agenda plans, using the template and sample as guides. Encourage creativity. Make sure people know they will be posting their final agenda at the end of this part.

Part 5) Posting Agendas and Closing
suggested time: 10 minutes

Now, ask people to take some tape and post up their agendas. Give people the chance to do a quiet Gallery Walk and look over everyone's plans.

Then, bring the group together and close with some questions and discussion. Focused questions could include:

How was this process for people? What step did you find most challenging?
Do you feel more prepared for planning meetings? What additional help can I provide?
How would you like to follow up on this session? Any requests?

Close with evaluation if you would like.
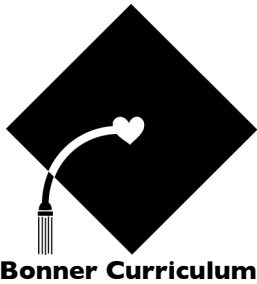
Appropriate Decision-Making for the Situation

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You need to determine who should be and is involved on a particular project, outcome, or goal. Once you know this, you can decide who should be at the meeting (or how many different meetings you will need to have, if that group of stakeholders is too big for one meeting or works in different groups). It is critical to assign planning roles.

Framework:

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Steps to Meeting Planning

Work through all of the following steps.

Determine purpose.

Determine that you need to have a meeting and for what reasons. Some questions to consider: Are you ready to have the meeting? If not, what will make you ready? Is the needed information available now? Do we need group involvement to move ahead effectively? What are the intended outcomes?

Consider the following common meeting purposes (source Interaction Associates):

Purpose	Example
Celebrating	Recognizing and honoring achievements and important transitions or life passages
Analyzing	Determining the causes of a situation and the relationship between different elements or variables
Decision making	Reaching a conclusion about what action to take
Informing	Providing or receiving information, or clarifying information, usually for use later
Mediating	Facilitating the result of negotiation or conflict between people
Planning and problem solving	Setting goals and establishing a schedule of activities. Or working in a team to resolve issues or take advantage of an opportunities
Team Building	Creating feelings of trust and collaboration, and establishing norms for how a group works together
Tracking then evaluating	Monitoring progress toward goals (usually for work that is being done independently) then assessing relative success in achieving planned objectives

After considering your purpose, write 1-3 clear statements of purpose or objectives for the meeting:

PURPOSE/OBJECTIVES:

Determine Pre Work. (for non-routine meetings)

Determine whether or not you will need to have additional meetings or information to achieve goals. Yes, you may need to have a meeting to have another meeting! Do you

need any additional information, approval, advice, ideas, or resources before you can move forward effectively? If so, figure out how to get them and what effect this has for how, when, where, etc. you structure your meeting.

<u>Additional meetings to set up/have:</u>

<u>Information to gather:</u>

Determine participants.

Determine who needs to be at the meeting and put a plan in motion to get them there. It's often helpful to have a diverse group of thinkers, representing the key constituents. Questions to ask: Who has relevant experience that ought to be considered in this area? Who will be critical to carrying out the plan?

<u>List of meeting participants to contact:</u>

<u>Other key considerations:</u>

Purpose for agenda.

Write down your purpose in the form of goals that you will present to meeting participants. This may include analyzing your initial purpose and objectives to be realistic for the context, length, timing, etc. of the meeting.

You can use the following guidelines:

At the end of the meeting, we will…

Or

Purpose of the meeting:

List topics to cover.

List or brainstorm the topics to be covered during the meeting and put them in a logical order. Don't get too concerned at this point about HOW you will cover each topic (which you'll do next). Some things to consider when ordering topics include:

1. Starting with a win or something positive. Unless the meeting is intended to address a crisis or deliver a reprimand, it's best to start with something that builds energy and momentum.

2. Make time for really important items. Generally it's best to cover the things that may require the most time (or go over) so they don't get squeezed out.

3. Consider scheduling – e.g. if other people will join the meeting to share an inspirational message, etc.

List of topics:

Create full agenda plan.

For each topic, identify the what, who, how and time. Delegate these items and planning if appropriate (e.g. you ask your main volunteer coordinator to prepare a report on volunteer recruitment that needs to be covered).

For each topic, determine what needs to be done/accomplished, how the topic will be handled, who will present/facilitate, and how much time is allotted. Check out the following grid example, which shows how each topic could get handled in a different way based on the purpose. Activities can include: games, presentations, review, questions and answers, discussion, brainstorms, speakers, skits, etc.

What	How	Who	Time
Review the status of volunteer recruitment (team needs to work harder)	Report from Volunteer Coordinator followed by new goals for month	Joey	10 minutes
Review the status of volunteer recruitment (team met goals!)	Show the completed chart Team Awards and Pizza Party	Joey and Maude	25 minutes
Review the status of volunteer recruitment (more training and problem-solving)	Review of what's working and not; Guest Speaker presentation; team analysis	Joey, Dean Ramirez, All	45 minutes

Your grid:

What	How	Who	Time

Prepare what you need.

This includes: logistics, equipment, supplies, materials, presentations. As the lead planner, you may want to engage other participants in this planning.

Use this checklist to help. Some of the areas may not be covered by you, if for example your meeting is a basic weekly meeting held at your service office, but make sure nonetheless.

Considerations	Your Plans and Notes
OVERALL LOGISTICS Some questions include: 1. How are participants notified? 2. Is space scheduled? 3. Are confirmations required?	
EQUIPMENT AND SET-UP Some questions include: 1. Is AV equipment needed and arranged? 2. Is chair and table set-up determined and confimed? 3. Is there a set-up and clean-up crew? **4.** Do you need flip chart, paper, markers, etc.? Who will get it?	
SUPPLIES AND MATERIALS Some questions include: 5. Do you have hand-outs? Copied? 6. Any films, videos, slides, presentation materials? **7.** Did you generate a complete list of supplies? Who is getting them?	
PROGRAM AND PRESENTATION Some questions include: 8. Did you walk through and finalize agenda? 9. Are all presenters confirmed and ready? **10.** Is there a back-up plan in case of interference?	

Do a mental walk-through.

In your mind or with key presenters, review the agenda to identify areas for revision or prepare for things that might not go as planned. This may be less necessary for standard, routine meetings, but can be very important for key meetings, such as those that involve the larger community or formal groups, such as a Board.

Review the agenda and adjust accordingly. Adjust activities to anticipate things that might happen with the people involved. For example you may want to do more context setting if the group is new or if proposing major changes in a plan, etc.

Key issues anticipated: Details/adjustments to agenda:

9. Visualize success.

Finally, end your planning with a feeling of confidence in your plan and in all of the work you have done to prepare for an effective meeting. Add final touches (such as details, fun, humor, etc.) that will put you over the top!

Of course, you may not be able to fully do these steps every time you are planning a meeting, but getting used to this process will pave the way for making effective meeting planning a breeze.

Things to do as final touches:

Campus Civic Engagement Committee Countdown Meeting

"A community is like a ship – everyone ought to be prepared to take the helm."
~Henrik Ibsen

Monday, March 10
Office of Student Community Service
2-4 pm

Goals:
a. Check our progress with the planning of the campus-wide
civic engagement-poloozafest
b. Adjust committee assignments and timelines to better meet goals
c. Stay energized for the last month before the event

Agenda Items:

1.   The Red Hot Volunteer Thermometer   Lily   10 minutes

2.   Community Projects Update   Xavier   15 minutes
        * Each project organizer will report on status with the project planning.

3.   Problem Solving Space   Mari   20 minutes
        * Group discussion of major issues to address

4.   Action Steps   Lily   45 minutes
        * Turn the major problems into plans for action

5.   Celebrating Our Work Done   Mari   30 minutes
        * A Special Treat

Agenda Template

Meeting Name: _____

_____
~inspirational quote or sentiment or joke

Date:
Place:
Time:

Goals or Intended Outcomes:

Agenda Items:

1. Item   Person Time
   a. Usually a tone setter

2. Item   Person Time
   a. Brief description

3. Item   Person Time
   a. Brief description

4. Item   Person Time
   a. Brief description

5. Item   Person Time
   a. Brief description