Meeting Development

1) **Establish What type of meeting are you having:**
   a. Informational meeting?
   b. Brainstorming meeting?
   c. Are decisions need to made at the meeting?
   d. Long-range goal setting meeting?
   e. Accountability meeting?
   f. Planning meeting?
   g. Working meeting? (Physical work and development meeting)

2) **Build an agenda for the meeting:**
   a. What is the purpose of the meeting? What do you want to accomplished at the end?
   b. Who is your audience?
   c. What needs to be accomplished or what is the goal?
      i. On daily basis
      ii. In one week
      iii. In a month
      iv. For quarter
      v. For the department
      vi. For the year
   d. What are the tasks needed?
   e. In looking at your goals for the set above, prioritize tasks.
   f. Once you have prioritize the tasks and future projects, establish what type of meeting you would like to have.
   g. Depending on the type of meeting you have, there will be different actions and activities that will need to be added to accomplish your goal.
   h. Once we establish the content of the meeting, decide how much time is needed each section of your meeting. It's important to consider if you have enough time.
   i. Create the order of the agenda. Always put items that need to be accomplished at the earlier part of the agenda to ensure that you will complete it in case you run over time.
   j. Think about the flow of the meeting when creating the order of the agenda. Depending of what time of meeting you are having, the flow of the meeting will help people who are present to generate ideas or see the larger picture easier.
   k. See sample agenda below for information on what should be on your agenda.
   l. Send out the agenda for your team and send out anything tasks or information that they should be aware of before the meeting. Please send agenda 3 days in advance if possible so they have ample time for feedback and review.

Agenda Template

1) *Purpose*- It is important to let those attending the meeting know why you have gather together so that there is a sense of purpose to be engage in the meeting.

2) *Introduction/ice breaker/ Check in* – If it is your first meeting, this is a MUST to get people introduced and feel comfortable in sharing ideas. Also, some ice breaker would be helpful depending on the meeting. Please consider ice breakers that would be appropriate for the meeting and audience. For example,
- a. Informational- Name, Major, One interesting thing
- b. Idea Generation- Name and goals for the team.
- c. Informational and work related- Name and How you communicate?
- d. Team exercise- Team building or interactive activities can be found online or through other colleagues or team members

3)   *Ask if your team have any agenda items or anything they would like to address on the agenda-* Any urgent items need to be put on the agenda and towards the earlier portion of the agenda.   It is at the discretion of the facilitator (most of the time) and the team (depending on style of meeting & facilitation) whether or not an item needs to be added or parking lot (save for later).

4)   *Follow up on existing project, if any-* This is important for accountability and to make sure that your team's effort on a project is recognize no matter how long or short it is.   It also helps to keep everyone engage in the team and feel that they are a part of a larger organization.

5)   *Other Agenda Items-* These are items that you have prepared above.

6)   *Recap of the meeting-* This is important to make sure everyone is on the same page at the end of the meeting about what was discussed or what decisions were made. This is an opportunity for questions, clarification, and final input.

7)   *Next Steps-* This is important for the team to self assign tasks or be assign tasks to be accomplish before the next meeting. Make sure to create measurable next steps and tasks.
- a. Needs to have due date and progress checks
- b. Create a timeline
- c. Make sure work is distributed equally and everyone is assigned a task.
- d. See measurable tasks for more information.

Meeting Facilitation

Facilitator's role-

1) It is the role of the facilitator to help move the agenda along and ensure that the team or group accomplish what is on the agenda. The person developing the agenda does not have to be the facilitator.

2) Understanding time- It is important that the facilitator understand how much time is allotted for each section. It is the responsibility of the facilitator to remind the group of the time that is allotted. For example, if you are short on time,

    a. Information is being given: Shorten the information if necessary and possible or extend this portion of the agenda and shorten another item. Facilitator or person giving the information can decide this.

    b. Decision needs to be made: Is there enough time to make the decision? Is the decision urgent and needed? Is there enough information already given for a decision to be made? Utilizing all of these questions, determine if a decision need to be made right away, if discussion need to be extended beyond the time allotted originally, or can you have the team think about it and decide at the next meeting. Do not take too much time to decide on this as it would take time from other items on the agenda.

    C. Do this closer to when time runs out.

    D. If this is part of a collective meeting model, move to the group for a decision.

3) **Keeping the group on task**- It is the role of the facilitator to ensure that the group is having relevant discussion to the meeting and agenda item at hand. If someone is going off topic or is speaking too much, you want to bring it back to the topic at hand. For example,

    a. If someone is talking too much, wait for a good pause in the conversation. Remind everyone about the topic and try to engage other people in the room. Begin to call on people for input or do a round table of the discussion and put a time limit on the conversation. A good transition would be, "Great. Thank you… Does anyone have any feedback or response to what __ said?" Or "Great. What do other folks think about what has been said?"

    b. If someone is going off topic, wait for a good pause and acknowledge the person's comment. "Thanks _____ for the input. I will put this down for a later agenda item (if relevant to another on the agenda) or we can discuss this at the next meeting or address it at the end of the meeting. " This helps to end the conversation and now bring back to the agenda item on the table. Pull something that the person said that was relevant to the agenda item on the table and ask for input to move the conversation. "What do people think about what _____ just mentioned?"

    4) Move the team to an action or decision- Each agenda item has its purpose and it is the facilitator's role to help the team accomplish it. Get the group to decide. For example,

a. *To extend time or make a decision?*- You are getting close to the time allotted for the section and the team is going in circle and still having discussion. You want to have the group summarize what they have so far and what they agree on. Reiterate what the group have said and see if they are comfortable moving forward with what is listed? Are they comfortable with making a decision base on the choices that they have?

b. *If they decide to extend time, how long and what should be accomplish?*- It is important that if you are extending time to understand what you want at the end of the discussion. If the group is unable to agree on the end goal with the allotted time, then suggest tabling or moving the agenda item to another meeting. Outside meetings/working groups/ect../make decision.

c. *Make a decision*- If the group is comfortable with making a decision, then move to the decision making process that works for your team either by vote or consensus. Consensus voting tends to take longer.

5) **Facilitator is not a participant**- Depending on the type of meeting, a facilitator is not a participant of the meeting. Some time it is helpful to have a neutral facilitator to help move conversation and if the facilitator is engaging in the conversation some times it is difficult to keep on task. For idea generation meeting and discussion meeting, it is best that the facilitator help move the agenda along and assist the team in summarizing their ideas. If needed, bring in an idea, but refrain from speaking too much or taking over the conversation of the meeting.

Decision Making Models
a. **Collective/consensus making-** everyone needs to agree or is comfortable with the decision made. This some times can take a longer period of time if everyone does not agree. Facilitator does not have a decision making voice in this.
b. **Democratic decisions-** Everyone has a vote and depending on your voting structure a 50% or more of approval move a decision forward. Facilitator usually breaks the tie in this.
c. **Decision by authority-** The team leader or supervisor has the final say in the decision. If the facilitator is the team leader or supervisor, he/she makes the decision.

How to facilitate different type of meetings or combine content:

Informational meeting
These meeting can become monotonous and boring so it is important to keep it interactive and engaging with the audience.
d. Be prepared with the information presented.

e. Leave room for questions and clarification.
f. Depending on how long the meeting is, allow for break time.
g. Use variety of type of presentation to break up the monotony.
h. Consider multiple presenter or facilitators.
i. Create some interactive content if possible.
j. Consider what information can be shared through emails and what is needed in person.
k. Consider your tone in presentations & change tone if possible with different content.
l. Determine the importance of information to share with the group.
   o Reiteration of important information
   o Updates – relevant to all in attendances if not most
   o Staff input and suggestions can be out loud or anonymous through a secret note or inputting onto a chart on the wall.

Idea generation meeting:
1) Be prepared with what your own ideas and vision, but be open to new ideas to be presented.
2) Determine the purpose of the project or what is needed?
   o What is the issue or problem you are trying to address?
   o What is project? Remind folks of previous conversations if any?
   o Recap of earlier conversations
3) Come up with questions and criteria to guide that would help to guide the conversations.

Idea generation format
- depending on the team,…..
Communal with poster board information
   - Let your team know that everyone can come up and post ideas on board by themselves.
a. Once everyone is done, come back as a team and go over all the ideas
b. As a team, choose top 3 ideas & prioritize them .
c. As a team, make decisions on ideas or projects.
d. Determine next steps.

Roundtable discussion
e. Go around in a circle or by volunteer, one by one to generate ideas that they have (time limit). By going around in a circle, no one is feeling left out or feel pressure, but still has to participate.
f. Ensure that everyone have equal time to contribute so set a time limit per person.
g. Allows everyone to speak their mind in their time frame and record everything.

       h. Always have the facilitator go last if the person is also participating.

       i. Review all the items that have been shared as a collective.

       j. As a team, choose top 3 ideas & prioritize them.

       k. As a team make decisions on ideas or projects.

Other Team contribution

     a. Everyone has the opportunity to put input at random and place board. This helps to cut down on time, but can limit what ideas are put out there.

     b. Anonymous ideas- Everyone can put down ideas on a sheet of paper and the facilitator will report back the ideas.

     c. Small breakouts- If the group is large enough, break out into smaller group to allow team building and people who are quieter can contribute.

Working meetings: Physical work and development meeting

    1) Determine the purpose

    2) As a team or team leader determine tasks of each person.

    3) As the team leader, ensure people are on tasks.

    4) Towards the end of the meeting, allow time to review the work.

    5) Determine the next steps.