PRE-WORK: Plan a Great Meeting

A) HAVE A CLEAR PURPOSE
   ‣ why is this meeting important?
   ‣ what do you want to happen during the meeting?
   ‣ what do you want to happen as a result of the meeting? (objective)
   ‣ be sure attendees know, and support, this purpose

B) IDENTIFY WHAT TYPE OF MEETING IT WILL BE
   ‣ Informational: informing, sharing, gathering and discussing
   ‣ Discussion: clarify it is not a decision making meeting and who will make the decisions
   ‣ Decision Making: be clear what decision is being made
   ‣ Work Meeting: identify the project, create goals or objectives for this time frame
   ‣ Committees: who does the work, how is work tracked and completed between meetings, participation
   ‣ some meetings may include more than one format
   ‣ choose an appropriate space and room set up for the meeting you want to have

C) ASSESS THE NEEDS OF THE ATTENDEES
   ‣ talk to the attendees to learn about what they might want to discuss
   ‣ anticipate what they might want to know or learn about
   ‣ gather information in advance to help you meet their needs

D) HAVE A CLEAR AGENDA
   ‣ identify the important topics and issues that will be discussed at the meeting
   ‣ provide sufficient time to address all of the important topics, estimate time for each topic
   ‣ maintain focus on the agenda
   ‣ if diversions or distractions arise:
     ‣ identify them quickly
     ‣ prevent them from diverting attention from the stated purpose and objectives
     ‣ ask if they can wait until another time
   ‣ provide the agenda in advance if you want people to be prepared for the discussion

E) TIME MANAGEMENT
   ‣ allow sufficient time to cover all the agenda items
   ‣ if possible, schedule the meeting at a time when people are not rushed coming or going
   ‣ plan time frames for individual sections of the meeting
   ‣ if time starts to slip away or agenda items are taking too long, make conscious choices about how to manage the remaining time
   ‣ plan to start and end on time (encourage people to arrive before the start and do not exceed the end time without asking for permission)
   ‣ assign roles to help manage the meeting: time keeper, note taker/recorder, facilitator, etc.

F) PREPARE THE SPACE
   ‣ set up the room to maximize the type of interaction you want
   ‣ make it comfortable for the attendees
   ‣ have all the materials you need; test them before the group arrives
   ‣ provide refreshments or materials to keep people focused and on task

Great Meetings – Supervisory Forum / June 2018
**Facilitation: Lead a Great Meeting**

A) **Be Aware of Your Presence**
- *everything that you do, and everything you don’t do, has a significance*
- know and utilize the strengths of your style and your “identities”
- understand and adapt to minimize the impact of your style and any unproductive tendencies
- ask for feedback from the meeting attendees to gain more awareness of your style

B) **Establish and Actively Monitor Meeting Norms**
- involve the group in defining norms for how the meeting should be run
- make the norms visible and accessible during the meetings
- check-in on the norms regularly until they become established and functional
- if the norms are violated, point out the situation and address it if appropriate

C) **Shared Accountability**
- discuss how everyone in the meeting is responsible for making the meeting successful
- encourage people to speak up whenever something occurs that might be impacting the meeting in a negative way
- involve people in finding solutions to issues and problems as they occur
- *Observe … Propose … Check* – a respectful process for correcting meeting problems

D) **Actively Observe the Dynamics, Intervene When Appropriate**
- pay close attention to all of the dynamics in the room, especially on the periphery of the discussion
- balance your attention: watch what is happening and how it is happening
- help the group hold its focus
- know some techniques and ideas for infusing energy into the meeting or occasionally changing the style of the conversations

E) **Evaluate the Meeting Periodically**
- allow time for people to share their observations and opinions about how the meetings are working
- revisit and recheck the purpose of the meeting every year or so
- update the norms of the meeting as necessary
- offer feedback to the facilitator and leader when needed
- use a process observer to get a fresh perspective on the meeting and the facilitation
- standing meetings have a “life” of about one year after which the purpose should be re-evaluated
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Meetings are our work

Side conversations

Start on time
- by the clock
- chit chat completed before meeting starts
- missing people accounted for

Clear decisions

Agenda in advance:
- how to prepare for the meeting
- what input is wanted from people
- what outcome is desired

End on time
- when conversation ends (can end early)
- 1-hour limit
- identify how to continue if topic needs more discussion

Respect
- everyone who wants to can speak
- you can disagree, it’s not personal

Assignment of responsibilities
- assign to best person

Safety

Full participation
- listening
- speaking
- checking to see if someone wants to speak
- say it in the meeting, not afterwards
- stay in the circle

Stacker
- tracks progression of speakers

Cannot attend:
notify convener in advance