

Meeting Planning

Meetings are where collaboration happens. This module is about the structure and methods of meetings that elicit participation and collaboration among stakeholders. It provides fundamental concepts, tools, guidance for using the tools, and illustrations of good meeting design.

How to Use This Module

This short video describes how to use this module. This module is organized in nine sections designed to be used in sequence as the material builds on what comes before. Each section includes from a paragraph to a page or two of reading. This text is meant to be used in concert with active learning, and it includes links to additional components:

- Handouts with additional information
- Worksheets for practice assignments
- Short videos expanding on the written content
- Click to play video: [Meeting Planning](#)

Click on the items below to read more details and to link to the stakeholder group's ideas and context. Completed worksheets, compiled and saved, become a record of project process, practice, and application. This active practice is what engages project coordinators and leads to real learning as well as a well-designed meeting.

Why Focus on Meetings?

Let's begin by grounding in your own experience. Are you a meeting aficionado, one of the rare people who love meetings? Have you endured too many terrible meetings to really like them? Are you someone who hates any meeting on principle? Whatever your attitude, our work requires that we meet. We have to work in groups of people with overlapping interests, differing perspectives, and the mutual need to work on something together. This module focuses on meetings that need to elicit participation and create commitment to ongoing action. It also includes tips to improve regular meetings.

Why are YOU doing this Meetings module? Use the worksheet [Why Focus on Meetings?](#)

Getting Participants Engaged

This module is primarily about meetings that need participants to participate actively – to contribute their ideas, listen to others, and think with open minds – and create solutions better than one person could find alone. We know from experience that when we're actively engaged and 'paying attention' we get more information and feel more connected. When we've been part of figuring something out and weighing options, we understand the ultimate decision better and are more inclined to support it. But simply getting people together in a room, conference call, or online meeting doesn't guarantee they will participate fully.

The handout [Creating the Three Conditions for Commitment and Participation](#) describes a framework for engaging people and gaining their commitment.

This short video develops this fundamental framework in more detail: [Three Questions](#)

The Shape of an Effective Meeting

We want to design meetings that engage the people whose participation and contribution you need for the good of the project. We want to bring out people's natural response to collaborate, not to withhold or compete. So, is there a 'generic' pattern for good meetings?

The general outline for an effective meeting follows a three-phase flow. Each phase has a purpose. The Beginning phase builds a working community; it's necessary if you want participants to work together successfully. The Middle phase gathers, shares and analyzes data, the information relevant to the task. The Culmination phase wraps up the session's work and points ahead to next steps.

[The Flow Model Handout](#) describes this three-phase flow, and this short video describes it in more detail: [Flow Model](#)

Start to Plan a Meeting

Don't have that meeting – unless there's a good reason for it! Every meeting should be focused on a purpose and tangible outcomes you can see, hear or measure, and intangible outcomes you can experience or sense. Every meeting has participants who bring varied perspectives and personalities. And every meeting happens in a larger context of processes, meetings, other work and decisions. Think through the purpose, outcomes, participants and context before your meeting. This planning will ground you in realities and possibilities for this gathering and help you design an effective meeting. The [Meeting Design Planning Guide Worksheet](#) frames the elements for designing a meeting.

- Framework: Meeting Design Planning Guide
 - Start with purpose
 - Add specific outcomes, both tangible and intangible
 - Think about participants who should be there
 - Consider where this meeting fits in the roadmap of what happened before and what will come next
 - Clarify how this meeting relates to the decision-making process

Purpose and outcomes are essential. Be very clear about the meeting's **purpose** to help focus your attention when designing it. When you share the purpose with participants it helps focus their attention and expectations, too.

Articulate the intended outcomes to guide you in design. Every part of your agenda and meeting process should contribute to achieving your goals. Plan for **tangible outcomes** you can see and document – products like a list of ideas, a set of top priorities or criteria, assignments with a workplan, or a group decision. Also plan for **intangible outcomes** that advance working relationships among participants - results like more trust in one another and more optimism about the project. A bonus benefit of stating clear outcomes is that you can conclude the meeting by revisiting the goals... and declare victory.

Participants are a major source of information and creative thinking in any meeting designed for participation and commitment. Know who is coming. Check that they are the right people for this meeting's purpose in the context of the larger decision-making process. Adjust the invitation list if necessary. Think about who the participants are, where they're coming from, and what expectations they bring. For a major meeting or a new group, consider including participant voices in your pre-meeting design process.

Sketch a **Roadmap** to show the context for this meeting. What happened before? What will come next? How does this meeting fit in the larger picture? Display and review the roadmap in the meeting opening to show participants "We Are Here."

Get clear about how participants' contributions in this meeting will feed into the overall **Decision-making** process surrounding it. Who ultimately owns the decision, or has authority to decide? What's the role of this meeting/these people in the process? Are they providing early input? Helping to refine or prioritize options? Making a recommendation to the decision maker? Be transparent with participants from the start to prevent misunderstandings and disappointment.

Activities to Ensure Active Participation and Engagement

Activities are structured tasks or conversations that enable individuals and self-managed groups to engage in work that contributes to the purpose of a meeting. You can incorporate simple activities that actively engage participants in your meetings, even if that's not usual for you and your group.

The next four handouts – [Check In](#), [1-2-4-All](#), [Carousel](#), and [Dot Voting](#) – describe four easy-to-facilitate activities. These are reliable designs, foolproof ways to get people talking, listening and thinking together. These are standard structures that can be used in many ways. Tailor them with content and questions that support your particular meeting’s purpose.

Although talking and listening are important ways to think in a group, good activities use even more senses and modalities. Read the [Meeting Beyond Words Handout](#) to learn about structuring an environment that is conducive to learning and sharing.

Facilitation

Your thoughtful, intentional planning and design have a major benefit for you as a facilitator. You anticipated who is coming. You focused the agenda on a purpose and tangible and intangible outcomes. You got clear about the larger context and decision-making process. You designed a meeting that follows the flow phases of Beginning, Middle and Culmination. You tailored participatory activities to make good use of the wisdom in the room.

The meeting now requires more of the participants and less of you. You’ve done a lot of prevention and minimized the need for intervention during the meeting. Your role as meeting facilitator (facilitate means “to make easier”) is now easier.

There are three more things you can do to be ready to facilitate your meeting.

First, anticipate what you can do if things go wrong. In real life, people stop coming to meetings, people may not respond as you expect, conflicts can arise. See the handout [Tips for When Things Go Wrong](#) for some ideas for how to handle yourself and respond to the group with things go wrong.

Second, consider your **facilitation stance**. This means clarifying, in your own heart and mind, the values you bring to the group. If you have to pause to center yourself during the meeting, you can quickly recall how you want to be. (For example, a ‘mantra’ might be “Trust the people. Trust the process. Trust myself.” Or, “No matter what, I believe we can succeed.”) You may come up with a short list of key thoughts; a line from a poem or a song lyric that speaks to you; an image, photograph or drawing that captures the essence for you; or a gesture or movement that embodies your intent. This short video develops the idea: [Facilitation Stance](#)

Use the Worksheet [My Facilitation Stance](#) to reflect on the values you hold and your intended stance as a facilitator of participatory meetings.

Finally, **know yourself**. Do you tend to follow rules and guidelines precisely? Let yourself color outside the lines; follow your instinct to adapt a method or try something new. Do you tend to second-guess yourself and be easily influenced by others? Let

yourself see your plan through; trust yourself. Your learning and experimentation with meetings can be a journey of self-discovery as well.

Make Your Regular Meetings Better, Too

Every meeting needs a clear purpose, a way to open, and a clean close. But a lot of our meetings are simple, routine update sessions for ongoing communication among staff or other partners; they don't need extensive engagement methods. And you attend many meetings run by others; you don't control them. How can you improve meetings when there's little time or opportunity for active engagement, or when it's not 'your' meeting?

For meetings you run, see the handout [Tips for Better 'Regular Meetings'](#). The suggestions start with reviewing standard elements like purpose and participants. There are suggestions for different ways to structure the agenda, play with logistics and technology, and share meeting leadership roles.

For meetings you aren't in charge of, you may be able to make simple suggestions to the meeting leader, privately or in the group. You may be able to facilitate 'from the side' as a participant. A few ideas for being 'facilitative' as a participant are:

- Ask questions like "What do others think?" or "I wonder, what's your thinking now?"
- Make process suggestions like "Could we go around the group and hear an idea from everyone?" or "I'd like a chance to gather my thoughts; could we talk in pairs for a minute or two, and then open the group discussion?"
- Check for understanding by paraphrasing, especially after a confusing comment or complex presentation. You might say "I'm not sure I got that right... Is this what you said?" Or ask "Is someone else able to summarize that report?"

Design a Meeting that Guarantees Engagement

You've thought about this meeting from many directions. You know the purpose, outcomes, participants, and context – and have filled in a Meeting Design Planning Guide. You've imagined the general flow of your meeting. Now you have particular activities in mind that you can use. It's time to pull together the detailed design for a great meeting that will engage your participants and focus on your intended outcomes.

Your next tool is the [Windowpane Planning Guide Worksheet](#). This follows the Meeting Design Planning Guide to add detail to your meeting plan. It uses the three phase Flow Model to structure the details of the Beginning, Middle and Culmination of the meeting. Together, your completed Meeting Design Planning Guide plus your Windowpane Planning Guide comprise your meeting design.

Glossary

- **Activities** – structured tasks that enable individuals and self-managed groups to engage in work that contributes to the purpose of a meeting.
- **Collaboration** – working in concert with others.
- **Commitment** – continuing to act on work that began or happened in one context (like, a meeting) and requires more attention and effort beyond that.
- **Engagement** – giving full attention, usually accompanied by activity, from thinking to listening and talking and to physical action.
- **Facilitation** – balancing the planned intent and the human realities of a meeting to make it easier for the participants to be successful.
- **Meeting** – a working session where two or more people exchange information and work to advance mutually important work.
- **Participation** – actively thinking, listening and contributing.
- **Roadmap** – a sketch or written depiction that shows the context for a meeting, what came before and what will happen after.

Resources

Videos

- [What Do Facilitators Do, Really?](#)
This video explores the three roles of facilitators. Facilitators are the architects, pilots, and guides for effective meetings. It explores how facilitators shepherd a meeting from inception to completion.
- [Exciting Things are Coming](#)
Scenes of a large group, high engagement community summit, including interviews with participants. In Wausau, Wisconsin in 2011, 187 members of the community met for 2 days to determine a shared vision for the future of their school district and their community. A vivid story of how great meetings can make a difference.

Websites

- [Liberating Structures](#) is available as a large format paperback book and online. 'Liberating Structures' are activities that promote engagement, understanding, and creative high-quality results in groups. These activities really work. Many of them take just 15-20 minutes and yield better quality discussion. The methods are described clearly and modifications and examples are provided.
- [Illustrating Progress](#) is Chrissie Bonner's graphic facilitation website. She's posted images of many group meeting processes and graphic products. Very inspiring! And beautiful.
- [Interaction Institute for Social Change](#), their website, including the blog, offers specific ideas for handling meetings and facilitation. They do lots of training, are based in Boston (and Ireland.) IISC was founded decades ago by a co-author of an early classic, a book called How to Make Meetings Work.
- [International Association of Facilitators](#), this is the professional and certifying association for meeting facilitators. See especially their descriptions of the

Facilitator Code of Ethics to better understand the neutral ‘third-party’ stance of a facilitator.

Books

- ***Collaborative Leadership in Action***, by Patrick Sanaghan. This book is an excellent, practical resource. It provides many designed activities for data gathering, problem solving, sense making and building team effectiveness. The descriptions that are clear and well-illustrated, with step by step instructions adaptable to your content.
- ***Facilitator’s Guide to Participatory Decision-Making***, by Sam Kaner. The definitive guide to understanding and working effectively with group dynamics, for learning or decision making. Methods for listening, managing conflicts, using small group activities, and constructing a logical sequence of activities to achieve your intended purpose.
- ***Time to Think***, by Nancy Kline. Read this book for a deeper understanding of the concept that listening can ignite the human mind. Kline has identified 10 behaviors that form a ‘thinking environment’ and improves the way people think.
- ***The Collaboration Response***, by Gil Steil. Asserting that collaboration is as natural as competition, Steil describes 8 axioms that elicit collaborative action for the greater good. Full of stories that illustrate his points and suggest positive possibilities in your own systems.
- ***A Leader’s Guide to Reflective Practice***, by Judy Brown. A highly readable guide to authentic leadership, on a human scale, with short poems by the author and simple methods for living into your leadership, whatever your role.

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