Designing Effective Meetings

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Quarterly SRS Training
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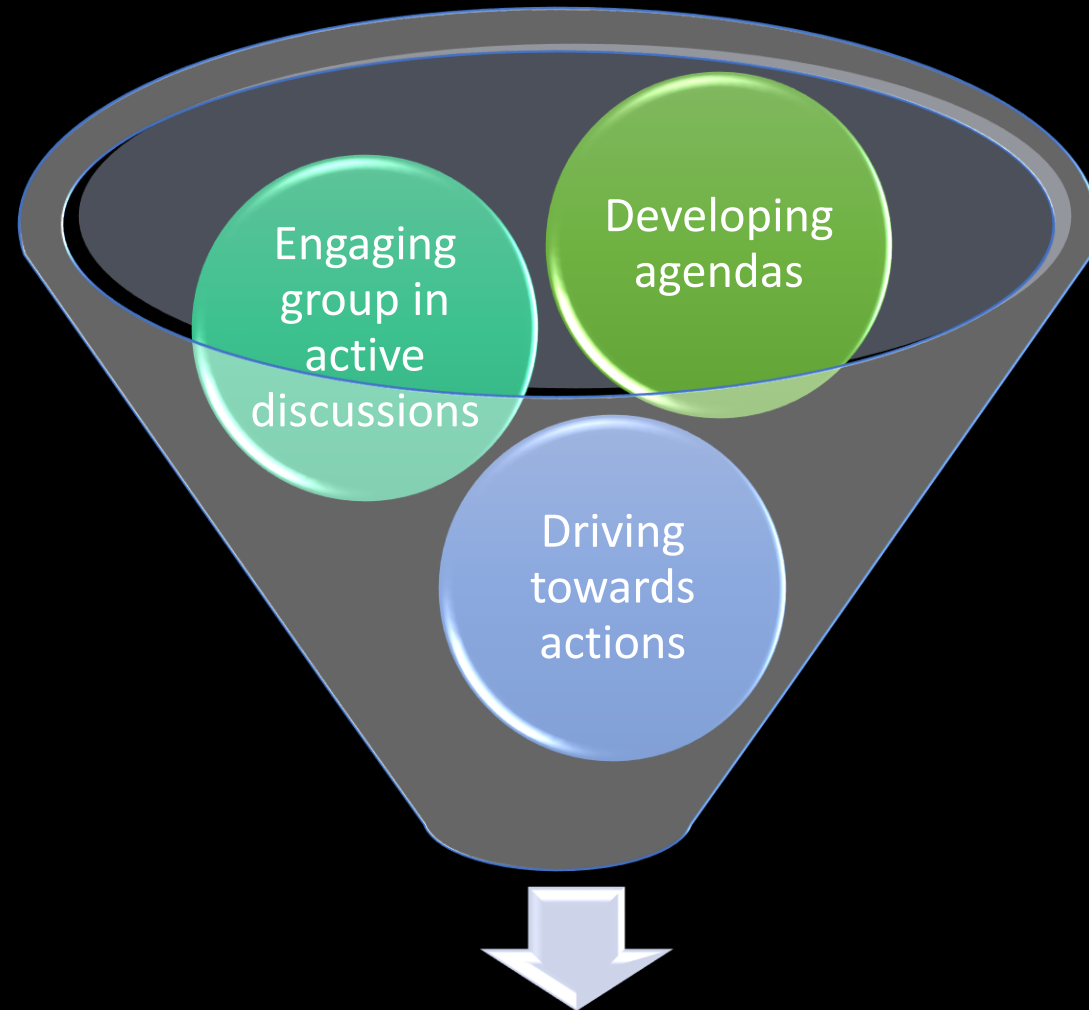
Purpose:

- Bring GIT and workgroup leads together to **enhance the facilitation capabilities** across the partnership organization by designing effective meetings

Outcomes:

- Understanding of **how to engage your group more effectively**
- Knowledge of how to **design meetings that produce results**

Designing Effective Meetings

What makes a good meeting?

75% of your success happens before you start your meeting!

Facilitation is about what you did in preparation for your meeting.

Planning is key!

✓ Desired outcomes

✓ Promotion of participation and interaction

✓ Consideration of group dynamics

✓ Results in a significant return on investment for all!

Designing Effective Meetings

- Clearly define your **meeting objective** and **expected outcomes**
- Make sure agenda **reflects members needs** by seeking input
- Topics should **affect the entire group** and needs the **whole group to solve** them

Designing Effective Meetings (cont'd)

- List **agenda topics as questions** that members need to answer
- Define the **type of meeting** or **purpose of the topic**
  - To share information
  - To seek input for a decision
  - To make a decision
  - To brainstorm
  - To data gather
- Ensure **realistic time** for each topic
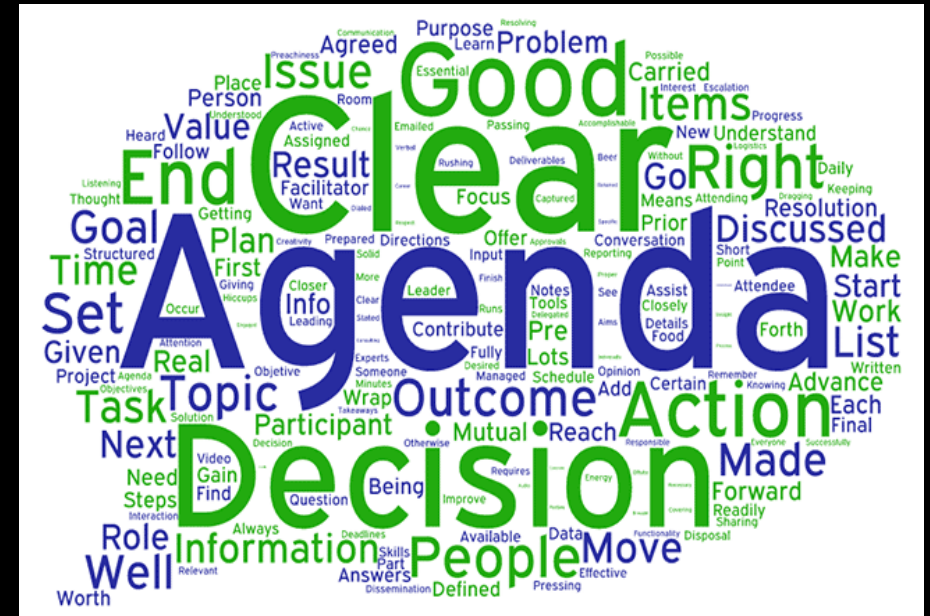
Designing Effective Meetings (cont'd)

- Identify a **process for each agenda item** and include in agenda
- Tell members **how to prepare** for the meeting
- **Assign a lead** for each agenda topic
- Think about **design elements** (tone, energy, information)
- Implement continuous **improvement**

Validating your Design

- ✓ Are we getting to the outcomes **as quickly as possible**?

- ✓ What will it **feel** like?

- ✓ Do I have a **balance of energy**?

- ✓ Is it **confusing or clear**?

- ✓ Am I **over-committing the time**?

- ✓ Can I **reframe the agenda topic** as a question?
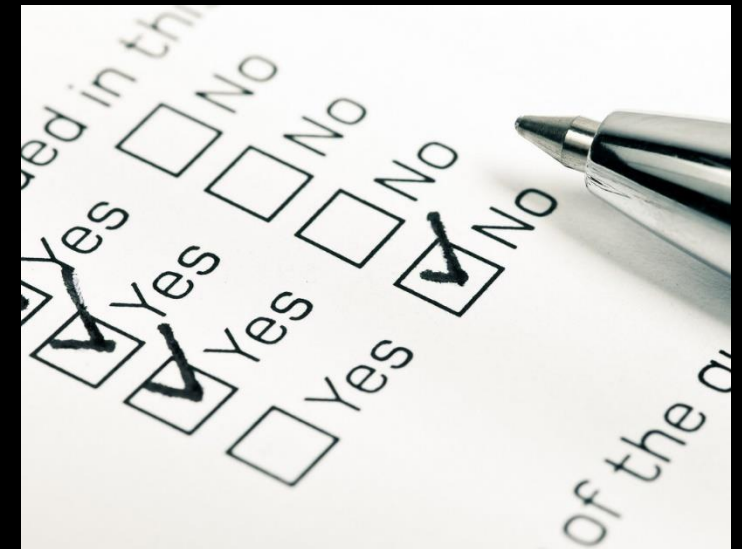
Practice Tool

Topic	Who	Process	Desired Outcomes	Duration (mins.)	Start Time	End Time	Preparation Notes

Building the Agenda

- **Opening**
  - Set the course
    - Include both the larger strategic context and the session objectives and outcomes
    - Review meeting logic, expectation setting, house keeping, executive kick off
  - Initial exercises
    - Introductions
    - Ground rules
    - Connection conversations (i.e., ice breakers)
    - Get their voice in the room as quickly as possible and get yours out
  - Expand information or define the problem
- **Narrowing**
  - Major "conversations' (big group, little groups, transitions, energy maintenance)
  - Identifying solutions
  - Making decisions/ recommendations
- **Closing**
  - Issue resolution, review, reflection
  - Take action/make commitments
  - Check-out
  - Evaluations

Engaging in Active Discussions

- Having good questions
  - Types of questions
  - Useful questioning
  - Targeted questions
- Managing the conversation
- Working with the group dynamics
- Applying facilitation techniques

"Managing" the conversation

1. Identify **where you are** in the agenda

2. Describe the **objective of the conversation**

3. Get agreement that the **conversation is worthwhile**

4. Describe the **process** by which that objective will be achieved
   - If there are more than two things you want the group to do, provide directions

5. Set the **time frame** and **assign roles**

6. Ask the group if what you are asking is **clear**
   - Don't assume nodding heads equals understanding

"Managing" the conversation (cont'd)

7. **Facilitate the discussion** and apply appropriate **techniques**
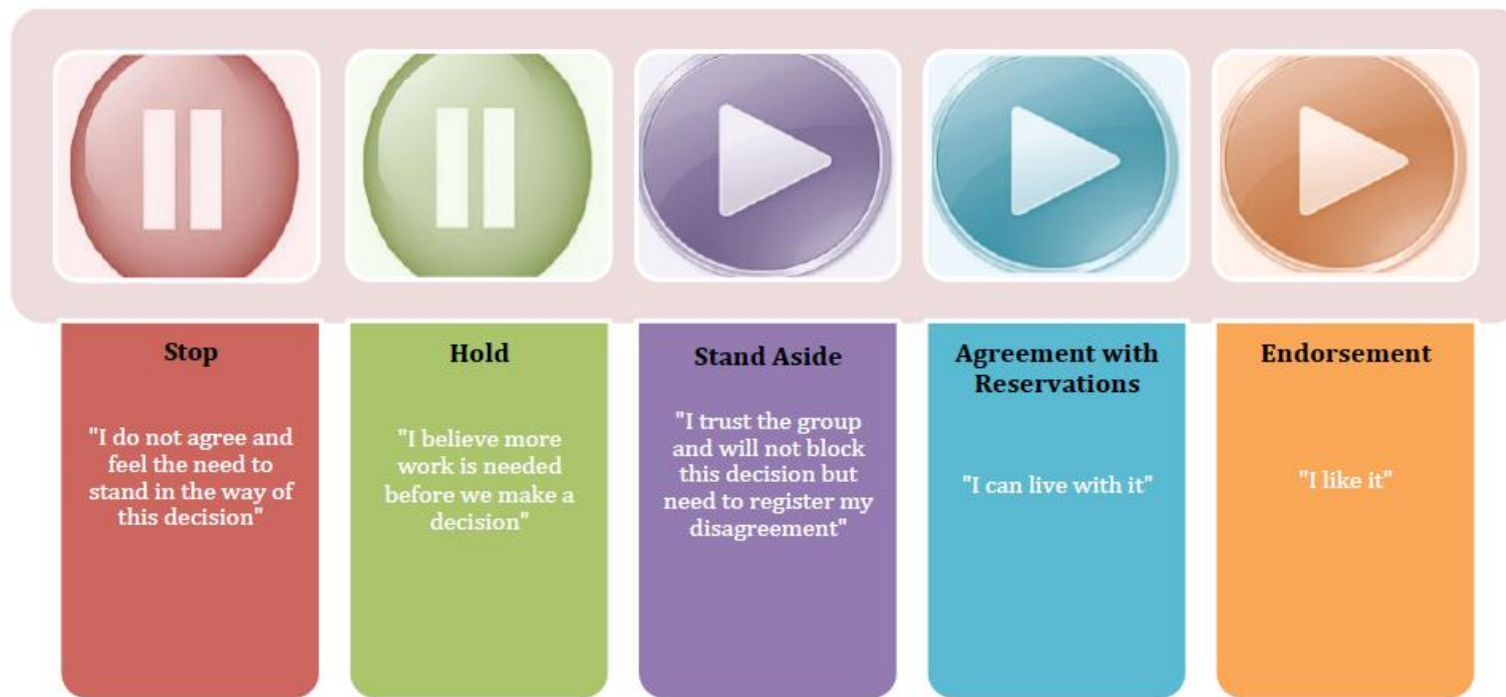   - Broaden ideas, clarify, close
   - Writing participant comments on a whiteboard
   - Asking follow-up questions
   - Paraphrasing comments
   - Initiating questions
   - Asking for clarification/elaboration
   - Encouraging others to react or add ideas

Driving Towards Action

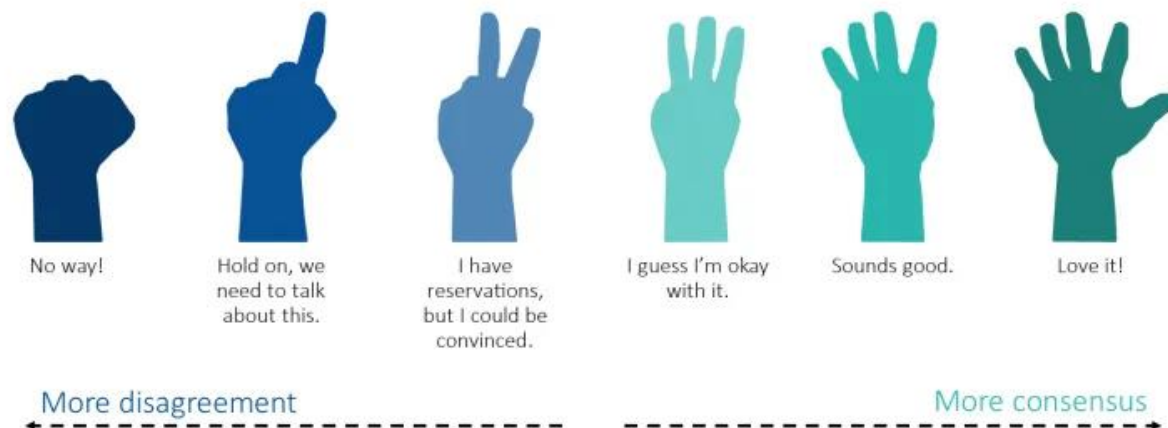1. Set **expectations** prior to meeting

2. Send out **background materials** prior to the meeting – and tell them why it's important to review

3. If a decision is being made, provide **viable options**.
    - Yes/no with discussion and amendments
    - Multiple choice
    - Narrowing down a larger list, applying a technique to vote or rank options
    - Consensus Continuum or "Fist to Five "

Stop	Hold	Stand Aside	Agreement with Reservations	Endorsement
"I do not agree and feel the need to stand in the way of this decision"	"I believe more work is needed before we make a decision"	"I trust the group and will not block this decision but need to register my disagreement"	"I can live with it"	"I like it"

Which best describes your level of agreement?

No way!	Hold on, we need to talk about this.	I have reservations, but I could be convinced.	I guess I'm okay with it.	Sounds good.	Love it!

More disagreement — **More consensus**

Driving Towards Action (cont'd)

4. **Evaluate** each option
   - Hear strong opinions
   - Identify all reasons to select an option
   - Voice reasons to oppose it
   - Use techniques to hear from everyone (i.e., round robin)

5. Make the **decision**
   - Use an agreed upon methodology to decide (i.e. consensus continuum, majority rules)

6. **Wrap it up** – restate decision, identify next steps, allocate necessary resources, celebrate and move on!

What makes a good meeting?