Planning and Leading Effective Meetings

Well prepared meetings connect people around collective efforts, have a clear purpose, and result in forward movement on ideas and projects. Consider the methods below to prepare, lead, and follow up on your group meetings.

Preparing for a meeting

Create a welcoming space. *Why? Effective meetings support equity and inclusion.*	For in-person meetings: • Consider accommodations needed for people of varying abilities. For example, is there an elevator for people with limited mobility or a microphone to assist with hearing? • Is the meeting site in a central location for members who have to drive? • Are tables and chairs arranged so that people can see and talk with one another easily? • Can everyone see the front of the room easily for flip charts, screens, etc.? For online meetings: • Do your group members have sufficient internet access? Can you recommend a public access space? • Are some members joining by phone and unable to view visuals on a screen? • Is your online meeting platform easy to use? Does it require a software download that might be a financial burden or technological burden? • Open the meeting with some tips on how to participate online for those who may be new to online meetings.
Offer opportunities for attendees to prepare. *Why? Prepared people engage and move work forward.*	Before the meeting: • Send a meeting reminder (location (or link), date, and time) a couple of days prior; make a phone call if you are welcoming new people or want to re-engage someone who has been missing. • Send a drafted meeting agenda and materials to review in-advance. • Remind your invitees of any action items and deadlines to be done prior to the meeting. Seek ways to support group members who have been unable to accomplish their action items.

During a meeting

Start on time. *Why? Promotes the value of time.*	• To honor people who arrive on time, be sure to start the meeting on time. If people arrive late, plan to catch them up later.
First, connect people. *Why? Connection builds trust and group cohesiveness, even during tough times.*	• Allow ample time for introductions and personal check-ins for people to share freely and briefly about preoccupations they might be bringing to the meeting. • Give special attention to introducing new group members. Invite them to share why they are interested in the work of the group. Encourage them to ask questions about words, acronyms and ideas that might be more familiar to long-time group members.
Affirm a shared agenda. *Why? Consensus promotes commitment and follow-through.*	• Post the agenda for all to see. Print and hand out copies or have on a flip chart, whiteboard, or projection screen for in-person meetings. For online meetings, share on a screen or have people open via email for online meetings.

	• Review each agenda item and modify the agenda, as needed. Add or delete items per the group's consensus. Use this time to confirm that the amount of time given for each agenda item seems adequate and adjust, as needed.
Encourage participation from the whole group. *Why? Group participation creates shared power and encourages development.*	• Employ a variety of facilitation techniques to get input from all group members: going round robin; using individual writing; talking in pairs or small groups. See Brushy Fork's handout on facilitation techniques for how to use these. • Delegate agenda items to other group members to facilitate. Step back unless these group members ask for your input. • Assign tasks evenly and take time to check in that people understand their assigned tasks. If people are learning how to do a task, consider assigning partners to tasks.
Plan the next agenda as a group. *Why? Consensus promotes commitment and follow-through.*	• Set aside time in every agenda to brainstorm topics for discussion at the next meeting. • Ask group members who is interested in facilitating each of the brainstormed topics. • Ask group members to list guiding questions they would like to answer about each of the topics during the next meeting.

Evaluate the meeting process
 	
Why? Promotes transparency and continuous improvement.
	• Wrap up the meeting with a quick evaluation for immediate feedback on how the meeting went:
	   o What went well at today's meeting?
	   o What do we need to change for the next meeting to be more effective?
	• Consider assigning a process observer at your meetings to help give feedback on how the group is working together, such as whether people are cutting one another off or are not participating.

End on time *Why? Promotes the value of time.*	• If individual agenda items run long during a meeting, check with the group about whether they want to continue the discussion at the current time or move to a future meeting. If they want to continue the discussion, ask what other item can be moved to the next meeting, so that the current meeting ends on time. • Openly discuss respect for the time of those at the meeting. Develop a culture that values beginning and concluding meetings at the agreed-upon time.
Keeping the momentum between meetings	
Adjust meeting process *Why? Demonstrates commitment to feedback and improvement.*	• Based on process evaluation and feedback from the previous meeting, adjust techniques, time, and other factors. • Check in with group members about the adjustments at the next meeting to confirm that they are what people had in mind.
Support actions and tasks *Why? Encourages and supports individual and team responsibility.*	• Always indicate who is responsible for completing tasks and the timeframe for completion. • Create a system, either online or with phone calls, to provide reminders of any tasks that need to be completed prior to the next meeting. • For larger tasks or when people are learning, assign multiple team members to a task so that they can support one another. • Use committees or working groups that can hold meetings outside the whole group for complex projects. In this case, reports from committees and working groups should be considered a regular agenda item.
Celebrate successes *Why? Encourages group members and leads to further successes*	• Publicly announce and celebrate project completions or other group accomplishments through local newspapers, radio stations, social media, and other venues. • Recognize volunteers through appreciation dinners or other events. • Consider ways to encourage all group members. Brainstorm ways to create incentives, celebrate success, or mentor one another!