MEETINGS THAT ROCK!

By North Star Facilitators

Designing Productive Meetings

Agendas That Work Like Magic©

Handout 2

North Star Facilitators

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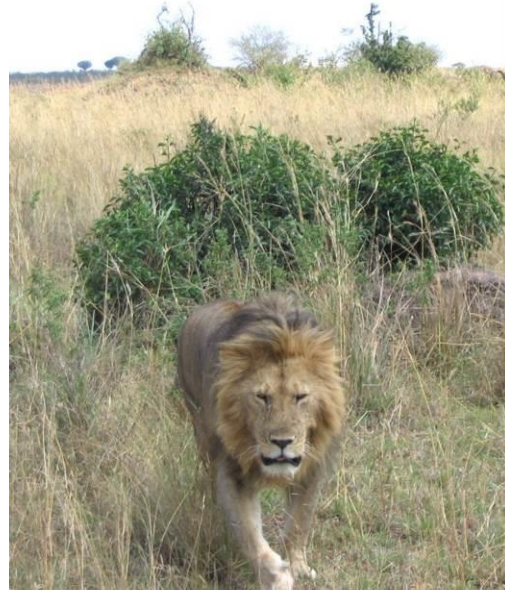
Introduction to

This Competency

Designing Meetings to Meet Client Needs



Are you ready to start designing meetings? Very few books or resources are available on this topic. I think it is one of the biggest "gap" areas in the field of facilitation. How can you be expected to know how to put together a really solid agenda that will achieve exactly what the group needs in this situation? There are steps as in anything else. In this workshop, we are going to teach you those steps so you can replicate "great design" any time it is required.

I like to use the word "design" in relationship to creating agendas, because building an agenda is a creative process. What do facilitators mean by the term design? For me, it is about planning the tone, flow, process and content of a meeting. There are many exciting things to think about – but in Roger Schwarz[1] language – it is really about ensuring you are clear at all times about your purpose, process and product. A well designed meeting has a positive and focused "look and feel" to it… (More on this on page 6). You know why you are taking up valuable time to do each agenda item (purpose), you know what outcome each agenda item is aiming for (product), and you choose a specific activity, tool or technique to get there (process).

We suspect you will see a big difference in your meetings within 3-6 months of regularly practicing these steps. You will walk confidently all the way to the meeting room and back!

In this handout, you will have a chance to learn and/or practice:

- ☐ 6 typical steps that ensure your agenda delivers results in allotted time
- ☐ An overall framework for structuring most meetings
- ☐ A template for planning each meeting
- ☐ How to set "head and heart" objectives for every meeting
- ☐ Ideas to create WOW! effects in the meeting
- ☐ "Best in the market" books and other resources you may want to consult to further your journey to becoming a competent designer of meetings.
- ☐ FAQ's (Frequently Asked Questions)
- ☐ Examples of discussion and idea generation methods
- ☐ Sample participant agendas

[1] The Skilled Facilitator Approach, by Roger Swartz

How to Benefit

From This Module

In this workshop, you will learn to design short (30 minutes) to half day meetings agendas that will have people saying after every meeting "…that was one of the most enjoyable and productive meetings I have ever attended". This handout will also cover how you design agendas that may last for several meetings – e.g., when you have big or longer term project to cover with the seam group.

If you follow the steps shown, you WILL achieve effective outcomes (one of the last competencies noted in handout #1 and required for professional facilitator certification). People will prioritize coming to your meetings because they result in a sense of camaraderie, are focused and help everyone understand what is currently happening, what needs to happen next and who will do what. These steps will also work for virtual meetings with a few adaptations. We'd like you to complete this workshop and handout exercises thinking you CAN create this kind of meeting result.

What will we cover?

In this workshop, we will emphasize what comes prior to the meeting - the preparation needed to design a succinct and compelling agenda, where people are intrigued and look forward to attending the meeting.

Your first exercise is again to:

Pour yourself a refreshing drink. Quickly flip through all the pages so you can see what is ahead. Put a small 'post-it' note on any pages that interest you. Take no more than ten minutes to do this. Then come back to this page.

WIIFM?*

Why would I take the time to plan an agenda?

*(i.e., why can't I just list the topics we need to cover and get people to talk about them? Or *WIIFM = What's in it for me?)*

1. If you prepare a thoughtful written agenda for every meeting, people will feel confident that they will be able to get through difficult problems. They will anticipate working together and have pride in the outcomes. People will look at your agenda and say to themselves (or even others), "This is exactly what I think we need to talk about. I'm glad we are finally addressing the real (important) issues." They might even start to look forward to your meetings!

2. They will do this because your agenda addresses: 1) Why we are here, 2) The products and experience we are aiming to accomplish, 3) When we're going to talk about each item and 4) The processes we're going to use for each item. It tells attendees that you've put a lot of thought into planning the meeting. People will know you value their time and are more likely to come the meeting prepared and ready to work.

3. Now imagine participants entering the meeting. They are confident that you will provide the process and positive tone to help them discuss the "undiscussible" or challenging topics. Finally, imagine the end of the meeting, and they will be thinking, "We solved our problem!" or "Now, I know what to do" or "I am so relieved". That is why you take the time and in your organization to allow for thoughtful preparation for meetings!

On page 7 is an overview diagram of the six steps we propose you take to design great meetings. Sometimes you can short cut a step but generally it is good to follow each step. It does not take as long as you think. If you have never prepared for meetings before, this might seem like a lot of work. I promise, it will make a difference! They are:

Step 1
What: Review issues/topics.
Decide the central question to be answered.

Step 2
Why: Formulate draft objectives for meeting.

Step 3
What: Create agenda outline with important item(s) early in agenda.

Step 4
Who, When & Where: Decide who needs to be there and best time for meeting. Find and reserve a suitable space.

Step 5
What Else: Circulate, get feedback and revise draft agenda. Establish time guidelines. Decide on meeting "extras" to create "WOW" effect. Rearrange items to ensure flow.

Step 6
How: Set up your meeting space to be inviting. Be there early to greet people.

Exercise 1: Metaphor Exercise

Now take a minute to do the metaphor exercise. It is helpful to identify an image and a phrase to help you imagine the difference you can make with proper meeting preparation.

A great meeting/event is like a …

(e.g., strolling through the hills, being able to see a rainbow in the distance and experiencing some exciting “jumping” points along the way)

Write a phrase and draw a picture or symbol of what a great meeting looks like to you and your colleagues)

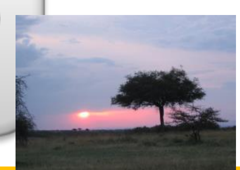
Step 1

What:
Review issues/topics.
Decide the central question to be answered.

Step 2
Why:
Formulate draft objectives for meeting.

Step 3

What:
Create agenda outline with important item(s) early in agenda.



Step 4

Who, When & Where:
Decide who needs to be there and time needed for meeting. Find and reserve space.

Step 5

What Else:
Circulate draft agenda. Revise agenda – establish time guidelines. Decide on meeting "extras" to create "WOW" effect. Resend agenda.

Step 6

How:
Set up your meeting space to be inviting and be there early to greet people.

Step 1

What: Review issues/topics.
Decide the central question to be answered.

I am going to offer you a radical concept. Meetings should only have 1 central focus. Decide what absolutely must happen at this meeting. This is your overall purpose. We call this step deciding on the central question. Even though you may have many agenda items, there is usually one focus of your meeting which needs some critical attention on that day.

To decide on this central question, I ask myself:

"What one thing could we resolve today which will make everyone's work go better?"

If it did not, you would likely not need to call the meeting. You can also ask yourself for every potential meeting topic you have on your list, "What will happen if we do not cover this agenda item at this time?" If you can see there are no major negative consequences, this item or items become less important to accomplish and can be rescheduled to another meeting or handled "off-line" if needed. Then the most important one will usually become evident.

Please note, if you are aiming for short 30 minute meetings, you may only be able to accomplish 1 really important item. If you have agreement to have a one, two or three hour meeting, you may be able to accomplish 4-5 important meeting items. Any more than this is likely to produce poor results and discouraged attendees. Even with this many items, there is likely still one overarching central question or focus that you want to be sure to address. If not, we suggest that you handle some of your items by email or by conference call.

It is quite acceptable to not have a group meeting if it is not needed. People will appreciate your leadership if you only use meeting for times when you have a central overarching question to be answered. If you are still doubtful about this concept, try the practice exercise on the next page. See also the FAQ's (Frequently Asked Questions) in the Appendix.

Here are four short examples of types of meetings and the central question to be answered in each.

Example 1: PRODUCTION TEAM MEETING

Number of attendees: n=5

Amount of time: 30 minutes

Central question to be answered:
How do we solve our customer's need to use our equipment in a new (untested) way?

Example 2: REGULAR TEAM REPORTING MEETING

Number of attendees: n=15

Amount of time: 60 minutes

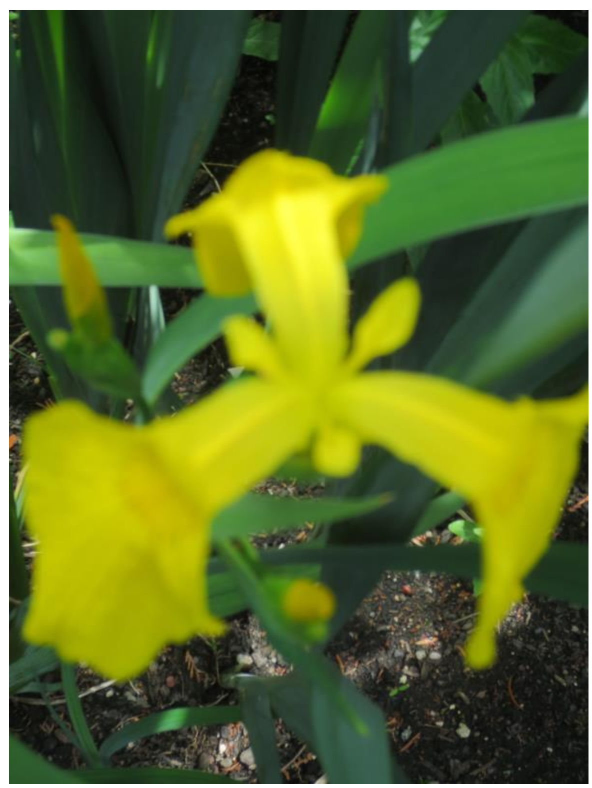
Central question to be answered:
What do we need to know about each of our project areas to support one another to do our jobs better? (Or how are we each doing?)

Example 3: MONTHLY BOARD MEETING – ONGOING BUSINESS/PLANNING RETREAT

Number of attendees: n=24

Amount of time: 150 minutes (2.5 hours)

Central question to be answered:
What is currently going on with our organization and with our clients/customers that we need to pay attention to for our planning retreat?



Example 4: WEEKLY FUNDRAISING OR MARKETING MEETING

Number of attendees: n=8

Amount of time: 30 minutes

Central question to be answered:
How do we publicize to a broader audience?

Exercise 1: Focus Question

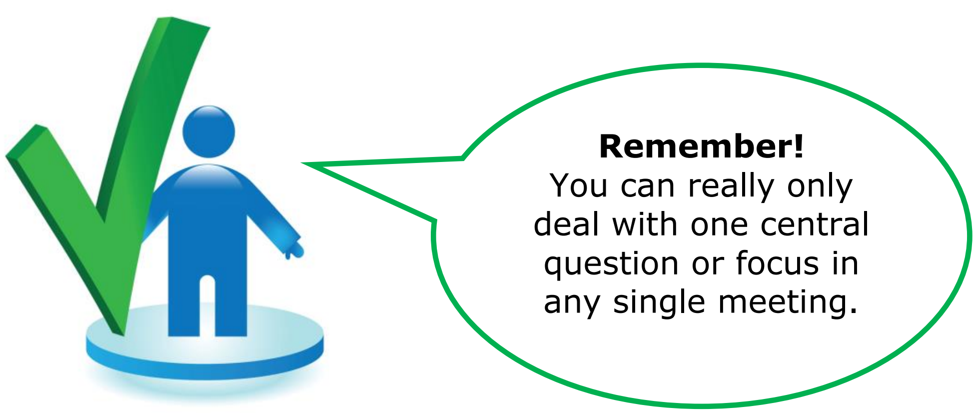
Now think about a meeting you will be leading in the near future and try out creating your own central question or focus for that meeting.

Meeting type:

Number of attendees:

Amount of time:

Central Question:



Step 2

Why: Formulate draft objectives for the meeting

Meeting objectives need to be succinct and include what, who, when and why if needed. We suggest you formulate two types of objectives: head and heart.

Objectives can be both **rational** and concrete (what people will know, do, understand or decide by when) ("Head" objectives) and **experiential** (what people will feel or experience as a result of the rational being handled) ("Heart" objectives).[2]

Here is an example of objectives for example 1 on the previous page:

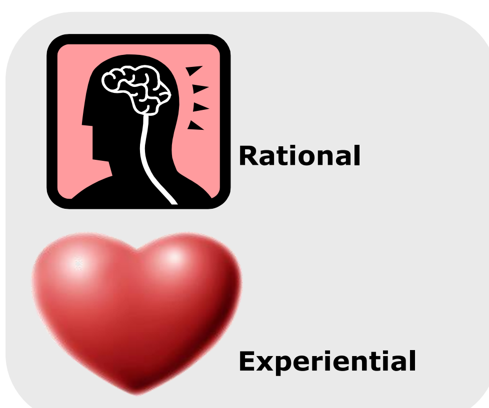
30 minute meeting purpose:

Helping our customer use one of our pieces of equipment in a new way (that we have not tested).

Specific objectives:

Head or Rational: Decide what we can say to the customer about his request, when we will communicate this, and who will communicate it.

Heart or Experiential: Gain confidence in our ability to meet customer need. Experience clarity about our next steps.



[2] The Institute of Cultural Affairs developed phrases for these two different types of objectives. They called the tangible, "rational aims" and the experiential – "experiential aims". More can be found in the book "The Focused Conversation Book". See resources page.

Exercise 2: Meeting Objectives

Now you try one out for your own situation. Create both rational (head) and experiential (heart) objectives. Both are needed although one may be more important than another for some meetings.

Meeting topic:

Specific objectives:

Head or Tangible:

Heart or Experiential:

Step 3

What: Create agenda outline with important item(s) early in agenda

Page 13 lays out a sample agenda. In the appendix we provide two copies of a blank template you can use to lay out your agenda items. Remember people have the most energy at the beginning of the meeting. You will want to handle the most challenging items early in the agenda. However, often the challenging items (or central question) also require group members to trust each other, listen well and/ or learn more about the background or context of the situation. You will therefore need a short warm-up before tackling the central question or most important item.

In general the framework for a 30-90 minute meeting might look like this:

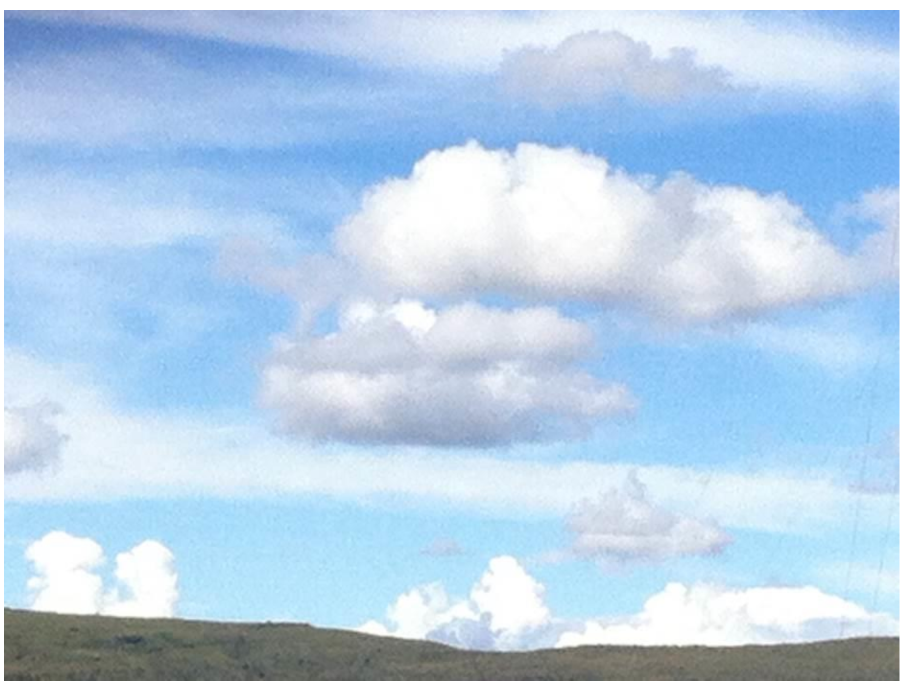
General Framework for Most Meetings

1. **Welcome**: share a short positive experience (5 minutes)
2. **Setting the Stage**: Remind people of central question, objectives, and ground rules (3-5 minutes)
3. **Context or Background**: Provide overview of most important agenda item (2-5 minutes)
4. **Discussion and Actions**: Provide structured questions to guide discussion. Help group decide on next steps and action items. (15-40 minutes)
5. **Discussion and Actions** (optional): Present remaining items one by one if time permits. Decide on next steps and action items. (30 minutes)
6. **Review and Reflect**: Summarize all actions and close with quick "short reflection on what you liked or learned at the meeting" from each participant. (5 minutes)

RECURRING MEETINGS: What about longer term project meetings?

Many of us have recurring project meetings that go over a period of months or even years. This may be the same group of people that are meeting. It may seem redundant to design an agenda for every meeting. However, we recommend that you think of your agenda in three stages. In our next workshop, we will talk about thinking frameworks which will help you understand how to help your longer term project meetings need to shift and change as they move through the three stages. In short however, your agenda design may look like this for each of the three stages:

Getting Started – The first few project meetings: Think of this as Data Gathering stage, where comfort and context setting are important. (See handout # 1). You will be essentially gathering information from all parties involved and ensuring everyone on the project has access to and understands the project parameters. You will be establishing the purpose of our group, and timelines , defining milestones for the project, developing a mission statement or group charter, etc.



Data Gathering stage- lots of things to look at…

Getting Going: Think of the middle few meetings as the warm up phase. In this phase, there may also be a bit of a "storming". The word storming is one of the stages of teams (web search on Tuckmann – stages of teams) for which you must be prepared. You want to ensure people have the right information from each other to collaborate and coordinate. There may be more need for report-outs of progress to date. Workshop #3 will help you prepare good debriefs and reflections for both progress reports and handling stalls in progress. Some team members may be reluctant to share difficulties or delays in progress. Your job is to tease out any difficulties or under performance in a non-threatening way. A useful strategy is 1:1 interventions to show everyone you are on their side and encourage them to stay committed to the project even in the face of so called failure. (Workshop 3 will also help with this). In this middle phase of a project, your agendas will likely delve deeper into option building, strategizing, or call for consensus-building activities (Workshop 4). This phase may also call for creativity to keep the group engaged and committed to problem solve when things fall apart. (Workshop 5).

Getting Going Stage: There is lots of activity but things may not be so clear

Towards Completion: The last few meetings are about completion. The agenda will now focus on faster-paced report-outs, soliciting support from internal team members and external resources to ensure things are delivered according to schedule. Patience is required here and you must show confidence in the team. Your style of agenda and your own personal style of facilitating will need to change to match the faster pace and need to drive things to completion. You also need to keep focusing the team on the essential things to be done. Keep taking things off the agenda if not essential. Your agenda will focus on questions that are decisional (Workshops 3 and 6), keeping the team-building going, and continually coaching the group to remember the big picture while they down "in the weeds" of details.

Towards Completion Stage: Clearing the air to the essential few things that still need to be completed

Sample Meeting Agenda Planning Worksheet

If you like music, we suggest you listen to some of your favorite inspiring music at low volume while designing your agenda to help your mind switch over to the right creative[3] side of the brain. Review the sample agenda worksheet, then fill in a blank template using an example from your own workplace or community work. If you do not have an example, we can give you a case study. Just email us. This can either be a meeting you took part in or one you will be leading in the near future. If it is a series of project meetings, fill in three generic templates – one for the early meetings, one for the middle ones and one for the coming to completion meetings.

An extra blank template is included in the appendix. Make copies of this to use for your future meetings.

"Good design is obvious. Great design is transparent."

Joe Sparano

"Design is when science and art break even."

Robin Mathew

Quotes taken from: http://designwashere.com/80-inspiring-quotes-about-design/

[3] See book, The Creative Brain, by Ned Herrmann for more information. The right side of the brain is known for its broader, creative thinking capacity. Music also helps the emotional brain, or limbic brain reach a positive mind state.

Sample Agenda

Example Topic: Production meeting (30 minutes)
Central question: What do we tell a customer who wants to use our equipment in a new way?

Date:
July 15

Time:
9:00-9:30 a.m.

Objectives:

Rational: decide what we can say to the customer about his request, when we will communicate this and who will communicate it.

Experiential: confidence in our ability to meet client request and clarity about our next steps.

Who: All technical support staff of a manufacturing company (n=5)

Where: Company Board room

Resources/planning needed: Book room; water and glasses, visual overview of situation; white board or flipchart; pens to keep notes; laptop; line up someone to give presentation

Agenda Item & Purpose	Proposed process	Timing
Overview of customer request Purpose: Everyone is on same data	Presentation with visuals if possible.	5 minutes
Analyze and break down request into specific tasks. Assign people, costs and date to be completed for each task Purpose: We respond quickly	Ask: What are the steps we will need to take to fulfill this request? Draw out steps on a large template – then add people, dates, and costs	15 minutes
Decide what to tell customer Purpose: Customer feels heard and is satisfied	Ask someone to summarize customer response. Write down. Assign who will get back to customer and when.	5 minutes
Review assignments & quick closing reflection Purpose: Nothing important is missed	Ask: What questions of clarity do you have about any of assignments? Ask: what is something that you liked about this meeting or you learned. Jot down for future meeting improvement ideas.	5 minutes

Exercise 3: Design a Meeting Agenda Using This Template

<table>
<tr><td colspan="3">Meeting title:

Central question:</td></tr>
<tr><td rowspan="3">Date:

Time:</td><td>Objectives:</td><td rowspan="2">Who needs to attend:

Where:</td></tr>
<tr><td><u>Rational: product(s))</u></td></tr>
<tr><td><u>Experiential</u>: experience)</td><td>Resources/planning needed:</td></tr>
</table>

Agenda Item & Purpose	Proposed Process	Timing

Step 4

Who, When & Where: Decide who needs to be there and best time for the meeting. Find and reserve a space.

Who should you invite to the meeting? This may be your usual team meeting in which case, it is your team. However, sometimes it is helpful to invite a resource person to help you gain knowledge quickly about a particular topic. If this is the case, be sure to let this resource person know exactly what you need from her or him and how much time you have allocated. Also, encourage the person to provide visuals for visual learners and make the presentation interactive so you don’t disrupt the collaborative and facilitative culture you have carefully created your usual meetings.

If the meeting is a special one of different stakeholders, rather than an intact team, you need to think more carefully about "the who". Do not choose the room first and then decide who can come based on the size of the room. Rather, think about who needs to be represented at the meeting:

- Key “historians” who have some background/history on the topic
- People with different roles and positions that have key bits of information
- Key decision-makers
- People with different or unpopular perspectives on an issue than the majority of attendees

Be sure to “coach” your meeting resource people to be succinct and facilitative.

For the latter, you will include a balanced perspective and ensure that whatever decision is taken, it includes all the different viewpoints. Now, create a comprehensive list of people. If there are more than you are comfortable facilitating, think about other ways to involve the people you do not invite. You can for example, ask them some key questions by email and bring their written responses to the meeting. For most beginning facilitators, it is easy to facilitate a group of 5-8 people and quite manageable to facilitate a group of 10-15. Once you surpass 20 people, you may need some expert facilitator support to help you think through how to involve everyone.

When: Have you chosen a regular time to meet for your team? Is it the best time of day and week given everything that goes on? If yes, continue with that time but check in periodically with your team about the usual meeting time. Ask, “Is this time still working for us?”

If it is a special meeting, you will need to avoid key holidays and times of the day for different religious groups represented on your team. We often for example forget to think about Jewish holidays or Islamic prayer times in North America at least. Also, people often think more clearly in the morning and are less likely to be tied up in “urgent”.

Where: if you need people to be focused and undistracted, an off-site meeting space is a good idea. If you want to create a new environment, try a different room, the cafeteria in non-busy hours, or a comfortable lounge for a change of atmosphere. If you have a usual meeting room, change things a bit such as seating arrangements, having a short meeting with no chairs. Always try to make sure you room/space is clean and uncluttered. If there is an area of clutter, cover it up with an attractive cloth. Remove all writing related to “old” meetings.

Step 5

What Else: Circulate and then revise draft agenda. Establish time guidelines. Decide on meeting “extras” to create “WOW” effects. Resend agenda.

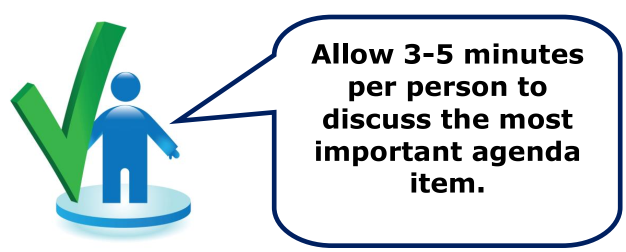
Prepare presenters: Over the next few days or hours, you may need to check in with key people about who will do what in each part for the meeting. In our example above, you may need to assign someone ahead of time to present the customer request – and prepare some visuals on a whiteboard, Power Point or provide a short handout of the situation. Remember, clearly tell them how much time they have been assigned and coach them to ask the group questions (to encourage interaction).

Feedback: Ask people for specific feedback on your objectives, the overall focus/central question, and topics. Ask how much time they would like devoted to each topic.

Revisions: Many times you may get no feedback on your draft agenda in writing. In this case, you can go ahead circulate the agenda to all participants. However, if you really want or need feedback on a particular item, just ask the best people directly. Some people do not respond to emails but will find the time to answer you if you call them or see them in person.

Assuming you have received some feedback, you may find that some people may wish to add other agenda items. You may also have found out that someone will be leaving the meeting early and he or she needs to be available for a particular part for the discussion. You may also have found out that one item needs more time and therefore other items may need to be removed from the agenda. The most important thing to keep in mind in this step is to ensure your central question can still be addressed with the changes you make. If someone’s suggestion cannot be managed in this meeting, be sure to let him or her know why and discuss how it can be handled in a different way or at a different time.

Timing: Double check the timing of each agenda item. A suggestion for timing on the central question agenda item is for every person in the meeting, allow about three – five minutes of full group time per person. (e.g. if there are five people, allow 25 minutes for this item.



You should also allow five minutes at the beginning and end of the meeting for context setting and closing.) Much of the discussion can happen in small groups as a way to fully engage everyone and to keep meeting time to a minimum. All other minor items might take 5-15 minutes each.

WOW effects: Now for the "WOW!" effects. Why? Remember we said earlier that you are aiming for positive meetings so people will work as a team, show up at meetings on time and generally positively acknowledge others' contributions. This is the reason for WOW effects. These special touches are especially important for ongoing project meetings where the same group meets regularly over time. People will stop attending if you do not offer some different "effects" at times. What are they? Here are my favorite easy ones:

- ☐ **Centerpiece**: a colored table cloth or tapestry in the center of the table with a few fun objects or a simple plant of low height or a vase of flowers.
- ☐ **Toys**: for people to fiddle with as they think- pipe cleaners, play dough (multi-colored), bubbles that you can blow into the air are a few
- ☐ **Food**: water, nuts, dark chocolate, or other snacks which are not overly sweet or messy
- ☐ **Music**: music player with cheerful, uplifting instrumental (no words or lyrics) music for when they enter and for breaks. You could really wow them if you had some local musicians in the group who would be willing to play a short melody for the group as they come in or leave. Let it be a surprise.
- ☐ **Give appreciations**: Ask participants to share words of encouragement or a specific appreciation for the person on their right.
- ☐ **Tent cards**: Provide folded index cards (5" x 7") and colored felt pens for people to create their own name tags when people do not know each other well.
- ☐ **Physical involvement**: Allow for times in meetings where everyone has to stand up and move to a different part of the room to view a visual or interact with different people. Provide soft throwing toys such as "nerf" frisbees or "koosh" balls.
- ☐ **Flipcharts**: Put colorful images on your flipchart pages such as the agenda or group guidelines page.
- ☐ Add yours…

____

____

____

Step 6

How: Set up your meeting space to be inviting and be there early to greet people.

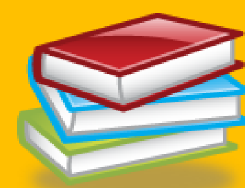
Here is what I typically do for every meeting I run regardless of the length of time. I do this because it conveys the message that I value everyone's time and presence and I want to create the best possible learning and participation opportunities. You can print this out and use as your checklist.

- ☐ Play music I like while I am setting up so that I am in a positive, relaxed frame of mind when the meeting begins.
- ☐ Ensure the space is clean and the table is cleared. People think better when the space is attractive and uncluttered.
- ☐ Set up enough chairs for all the participants. Set out two to three break-out spots.
- ☐ Write up the meeting objectives and agenda on the whiteboard or on a flipchart in large legible dark print for all can see. Even if people have a handout of the agenda, a larger wall version allows visual learners to participate more effectively.
- ☐ Set up centre-piece in central area and a toy or two at each chair or table spot. This adds beauty and a positive learning environment. Even "serious" meetings will benefit from these additions if you explain that it helps kinesthetic learners participate better.
- ☐ Set out water glasses and other refreshments as appropriate. Hungry participants do not think well.
- ☐ Prepare and post data needed to help move the group to decision.

Conclusion

This workshop asks you to spend more time preparing for your regular meetings than you might have done in the past. Consider trying out at least one or two of these suggestions to start. Then, keep building your own creativity and confidence in designing productive agendas. Please call or email us with any questions or comments. Enjoy your new skills as a meeting facilitator. The next four workshops provide you with specific tools to use in your meetings.

Our Favorite “Best on the Market” Resources



Books to help you explore designing agendas and tools to use in meetings:

Stanfield, Brian. 1997. The Art of Focused Conversation – 100 ways to Access Group Wisdom in the Workplace. The Canadian Institute of Cultural Affairs (ICA Canada).

Strachen, Dorothy and Paul Tomlinson. 2008. Process Design – Making It Work. Jossey-Bass.

Wiele, Bob. 2003. The Power of Smart Meetings – How to Plan and Run Collaborative Meetings that Get Results, Fearless Diamond Press. www.onesmartworld.com

Andrews, Tim. 2004. Where’s Your Spotlight? How to Enhance Learning for Others. Stretch Learning.

Hunter, Dale; Bailey, Anne; Taylor, Bill. 1995. The Art of Facilitation. Da Capo Press.

Rees, Fran. 1998. The Facilitator Excellence Handbook – Helping People Work Creatively and Productively Together. Pg 175-196. Jossey-Bass.

A Few Websites to help you explore design of meetings:

www.northstarfacilitators.com – Our own website has a “Resources” section with past newsletters focusing mainly on tips, tools and techniques for gaining competency in the six overarching international facilitator competencies required for certification.
http://www.meetingwizard.org/meetings/meeting-agenda.cfm
http://nonprofitmanagement.suite101.com/article.cfm/sample_meeting_agenda

Your Guide and Author of This Module:

Barbara MacKay

Barbara MacKay, MS, CPF©, principal of North Star Facilitators, specializes in strategic planning, facilitation processes, training, and consulting.

Barbara is currently mentoring facilitators from all over the world and cares deeply about passing on the skills to others so the world becomes a just, peaceful and creative place. Barbara strong interpersonal communication skills and experience allow her to work skillfully with a wide variety of participant perspectives. Barbara specializes in helping groups participate, problem-solve, plan and make progress in challenging and complex situations. She has an energetic, respectful style and clear delivery. Barbara has worked with 100's of clients from all sectors with her own company since 1995. She provided social, economic and environmental consulting and facilitation services with many cultures throughout Canada from 1981 to 1995.

Barbara is a: Certified facilitator and USA trainer with the International Institute of Cultural Affairs (ICA and Canada); Certified Professional Facilitator (CPF) and assessor of other facilitators world-wide with the International Association of Facilitators (IAF); Professional Development Strategic Initiative Coordinator for the IAF for four years; has been an Adjunct professor with University of Oregon (Eugene) (teaching the only required facilitation skills (4 credits) class of all Oregon universities at graduate level in Conflict and Dispute Resolution Studies); an adjunct professor teaching facilitation skills at Portland State University (Not for Profit Management Institute); certified OneSmartWorld™ trainer; trained in Disaster Crisis Intervention for facilitators; certified accelerated learning trainer; trained extensively in: Constructivist Listening and Cross Cultural Communication and Alliance Building; visioning processes; Mind Mapping™; Behavior styles model "Why Are You Like That?™"; and Herrmann Brain Dominance Instrument (HBDI). She is also trained and teaches about Learning Organizations; Organizational Journey (ICA); conciliation; "shifting from positions to interests"; conflict resolution; negotiation skills; anger management; risk communication; training for trainers; and curriculum development.

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Appendix

FAQs (Frequently Asked Questions) About Meeting Agendas

Q: How do I handle very large (over 40 people) group meetings with many agenda items when we only get together every few months?

A: *Decide what can be handled by email or conference call with smaller sub committee, prior to the meeting. Have key committee people make succinct presentations and have every table group discuss what they heard and report back their recommendations to the whorl group. Try to determine what is the cohesive piece that holds the whole meeting together (i.e., the central question or focus) and then break the many agenda items into no more than five large topic areas with sub-parts. Set up "stations" in the room to discuss each topic. You may first need to set context for each topic. Then, have people literally move around the room to each topic "station" to add their perspectives to a set of open-ended questions you want the group to address around this topic. Workshop three will provide more ideas of how to do this.*

Q: When should you have an agenda for a meeting?

A: *Almost always – a meeting without an agenda is generally a waste of time in my opinion. Sometimes you create an agenda on the spot with meeting participants but only if everyone knows why the meeting is called.*

Q: How do you get people to submit agenda items (or should you assign)?

A: *I usually tell people the general purpose of the meeting and ask for suggestions on specifics – often there is carry –over from a previous meeting (old business). You would only assign people to come up with specifics if those people are key resource people who may be reporting on a certain item to help the group reach an informed decision.*

Q: How should the agenda be crafted?

A: *Start with the items that need to be addressed in order to deal with the others. Otherwise, generally, start with the most important items first so these are handled while energy is high. Sometimes you need to get the little things out of the way first though to 'warm' participants thinking. Be very clear on your timing on these little items however because people have a lot of energy in the beginning and they tackle them with gusto and are reluctant to tackle the "bigger" items. Remember the "central question" principle offered in this workshop.*

Q: Should participants be able to alter agenda?

A: *Yes, with the group's permission.*

Q: **Should you ask attendees what are their goals for attending the meeting?**
A: *Generally people should come to the meeting with a clear idea of why they are there. But it is a very good idea, to ask people prior to, or early in the meeting, what they hope to accomplish by the end of the meeting. This question ensures everyone is on track in terms of their expectations. If their expectations are unrealistic, the facilitator can let them know certain items may need to be left for another meeting. It also lets the group know whether the agenda order needs to be changed if expectations are different than what the agenda calls for.*

Q: **What are some methods of maximizing the output and minimizing time?**
A: *Send an advance agenda. Tell people personally in advance why their presence is needed and what advance work is needed. Get group agreement on timing of each item and stick to this timing (within limits). Schedule meetings for end of day (e.g. 3: 30 p.m. if everyone wants to leave by 4:30). Use structured discussion methods with open-ended questions.*

Example of how to lead a discussion

Consider each meeting topic carefully. What do people need **to do** for each topic? What type of thinking is required?[4] Do they need to:

- Be informed?
- gain agreement and/or understanding?
- decide on, or recommend a solution?
- analyze a situation?
- gain ideas for improvement?

Likely every topic will include several of these elements. For example, before you can make a decision about what to tell a customer as in our example on page 13, you will need to spend sometime 1) informing the group, 2)analyzing the situation, 3) gaining agreement and then finally 4) deciding what to do (four thinking steps).

In the information piece, a knowledgeable person might answer the following types of questions: What exactly did the customer request? When? Has this been done before? Why does he want this? How challenging is his request? Who needs to be involved?

Once members have the back ground information, they may need to analyze their capacity to meet this request. This time, an interactive discussion is needed where they will need to explore as a group, answers to a series of open-ended questions such as: Who has done something similar to this before? How long did it take? What technology is needed and available to help us? Which team members have the most expertise in this area? When are they available to work on this?

[4] OneSmartWorld system of thinking (see resource page) breaks down thinking into three basic types and codes them according to traffic light signal colors: creative idea generation (green – go quickly); information and analysis (yellow – go slow); and decisional (red – stop/pause). Each of these three main types of thinking has several sub types.

Then they will need to gain agreement on whether they can meet the client's request. You can simply pose the question: given all this information: what can we agree to do? Next, they need to decide on a possible course of action or next steps, and assign people and timelines to each step.

Sample questions you might use to generate a succinct discussion to both <u>inform</u> the group and a problem and <u>decide</u> on how to solve a problem in a short meeting

Purpose: Understand the problem and decide on immediate solution

Objectives: all facts are taken into account to understand the problem; all viewpoints are expressed; everyone feels committed to the proposed solution

1. What are some of the events that led up to this problem/situation?
2. What concerns do you have about the problem?
3. What is useful or positive about the situation?
4. What are the implications of this happening?
5. If you were to tell someone outside our group what was happening, what would you say?
6. What are some ways we can resolve this problem? (see idea generation technique below)
7. Which solution will be easiest and most effective to implement?
8. What can we do to make sure everyone is comfortable with the proposed solution?
9. What are our next steps?

Meeting Agenda Template

<table>
<tr><td colspan="3">Meeting title:

Central question:</td></tr>
<tr><td rowspan="3">Date:

Time:</td><td>Objectives:</td><td rowspan="2">Who needs to attend:

Where:</td></tr>
<tr><td><u>Rational: product(s))</u></td></tr>
<tr><td><u>Experiential</u>: experience)</td><td>Resources/planning needed:</td></tr>
</table>

Agenda Item & Purpose	Proposed Process	Timing