



Brighter Strategies

Better process Brighter results

Meeting Planner



TIME TO COMPLETE: 15 – 30 Minutes

PURPOSE: To visually define your meeting purpose, ground rules, and goals.

BENEFITS: Allows the meeting organizer to set clear expectations, goals and ground rules in advance. Participants can see at a glance what is expected of them and how the meeting will proceed. It also models effective planning, clarifies participant roles, increases trust in the process, and boosts a thoughtful agenda for participation and productivity.

PREPARE

- Determine who should participate – you may want all program staff to be included or you may choose to limit participants to program and organizational leadership only.
- Determine specific goals that leadership or the team want accomplished for this meeting. If you ask for feedback on the agenda be sure to leave time for changes.
- Establish a schedule for the meeting and outline the agenda.



BRIGHT IDEA

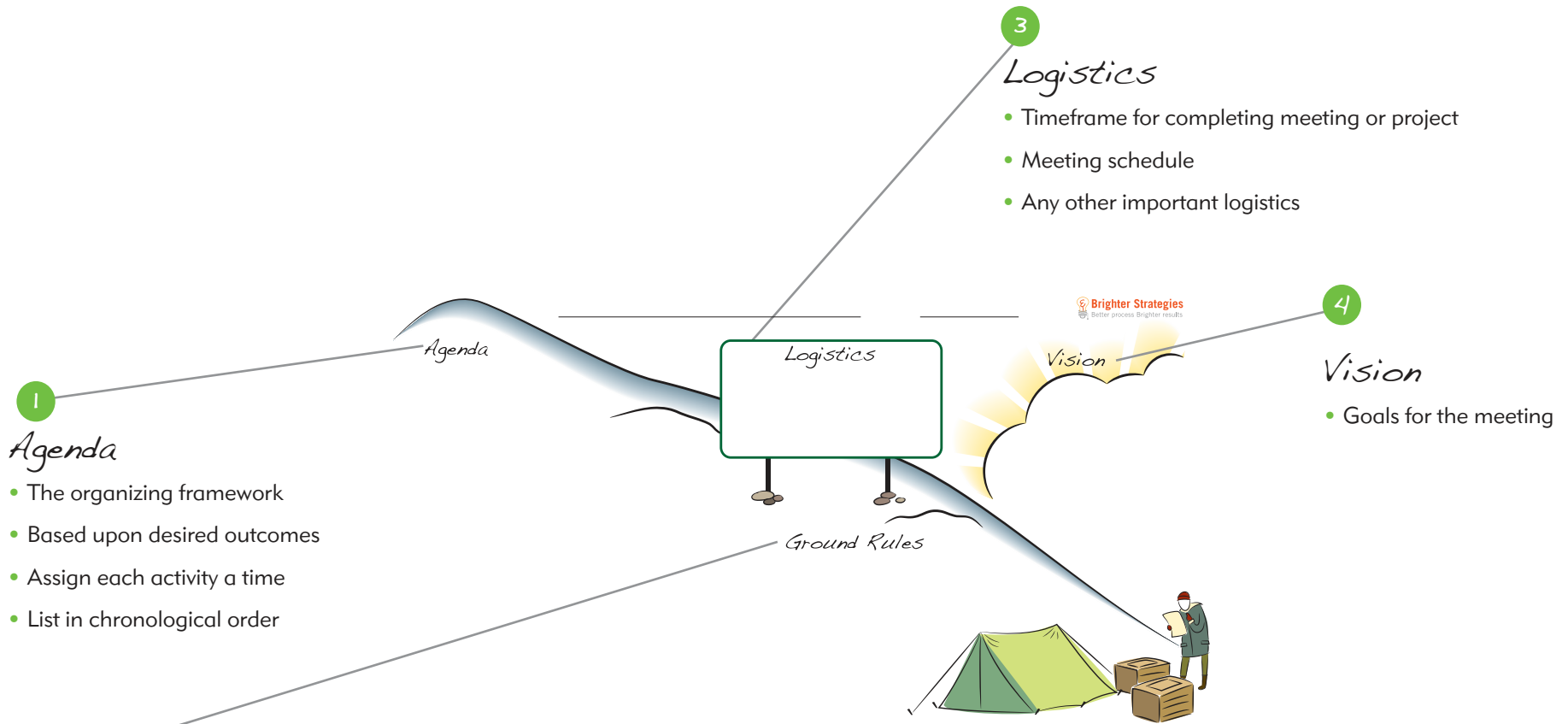
Be flexible with the schedule and allow extra time for participant discussion.

- Post the Meeting Planner and the For Later Discussion graphic organizers so they are visible by all participants.
- Provide each participant with pens, post-it notes, voting dots as needed.

FACILITATE

- Introduce elements of the Meeting Planner graphic organizer with participants.
- Point out the For Later Discussion graphic organizer so that participants anticipate a solution if they don't have an opportunity to air their ideas or concerns.
- Share the vision of this meeting — to identify your overarching goals and desired outcomes. These will vary in detail and specifics, but should drive discussion and solutions.

YOUR GRAPHIC ORGANIZER CONSISTS OF THE FOLLOWING ELEMENTS:



See page 4 for large example of the Meeting Planner



BRIGHT IDEA

Some rules to consider: be on time, all participate, listen respectfully, no electronics.

DISCUSS

- Have participants brainstorm the vision that your organization or program will accomplish. This vision will drive everything that follows in the meeting. They might use post it notes to suggest vision statements or discuss in a whole group setting. Voting dots can then be used to establish the meeting vision.



BRIGHT IDEA

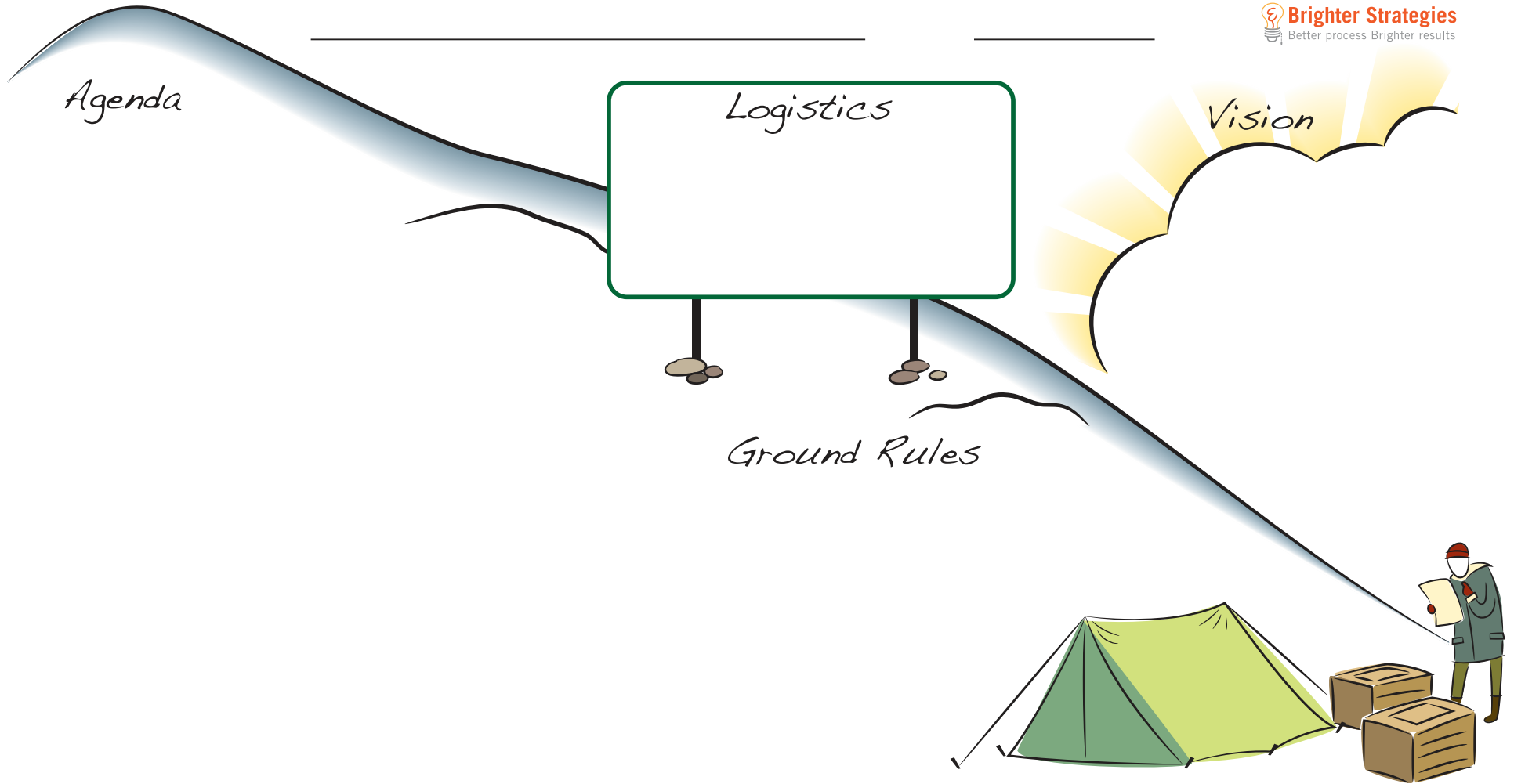
Ask participants to imagine a perfectly successful outcome from the meeting. What would that success look like? What would be achieved or accomplished?

- Ask participants to suggest roles that will be helpful to the meeting process. Formal roles might be team leader, chairperson, assistant, etc., while informal roles might be referee, synthesizer, listener, etc.
- Facilitate the discussion so that everyone participates. This may be done in large or small groups. If small groups are used be sure to allow additional time to report back, discuss and vote.
- Conclude the meeting by summarizing the discussion, decisions made, tasks delegated, deadlines, and any action required by participants. Depending on the time available, either address For Later Discussion items or place them on the agenda for the next meeting. Include in the summary any review plans for follow-up or the need to schedule any succeeding meetings. It is far easier to schedule the next meeting while everyone is at the table than it is to wait and contact each participant individually.



BRIGHT IDEAS

- Control dominating individuals — Make sure each individual has a fair chance of expressing ideas and opinions. Do not let one person dominate the discussion.
- Ensure that quiet participants are expressing their ideas and opinions. You may need to directly call on the quiet member and ask them for their opinion or for any ideas they would like to share. Remind them that silence is agreement (a suggested ground rule) and that each has a responsibility for the outcome.
- If participants are not happy with group outcome remind them they can air their concerns with the For Later Discussion items and be sure to place that discussion in the next meeting's agenda.



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