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How to Organize an Effective Meeting & Team

**How to have effective, welcoming,
and relational meetings**

- Breakdown
- Effective meetings
- Welcoming meetings
- Relational meetings
- Make your own agenda
- Challenges you are facing



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Breakdown

SKILLS

to implement & practice

- The “science” of planning & facilitation
- A set of basic skills that anyone can learn & use to make their meetings **MUCH BETTER**
- Most of these skills will seem obvious but that doesn’t mean they don’t require thought & intention
- This is the focus of the training today

INSTINCTS

to discover with experience

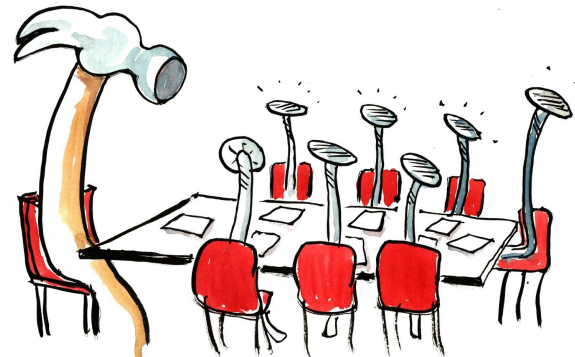
- The “art” of planning & facilitation
- Every person has different strengths & personality traits that impact how they run meetings
- It takes time to get to know these about yourself & to see in others



Meetings don't have to be terrible...

A meeting is an event at which the minutes are kept and the hours are lost.

- *Unknow*



1. Think about the best meetings:
 - a. Why did you feel good about them?
 - b. What made them successful?

2. Then think about the worst meetings:
 - a. Why were they terrible?
 - b. What could have made them better?





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Effective meetings



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Effective meetings

What sort of things come to mind?

What sort of things come to mind?

- Goal is achieved by the end
- Start and end on time
- Right people are in the room
- Someone is responsible for the meeting
- Attendees are engaged
- There's a good reason to have the meeting



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- **Purpose** = why is this important?
 - **Outcomes** = what do we need to accomplish?
 - Be as specific, tangible as possible
 - Should be different than the purpose
 - **Process** = agenda, how will we accomplish the outcomes?
 - Stick to start and end times as best as you can
 - If you make changes to agenda during meeting, get thumbs up from the group
 - Build in **facilitation roles** into the meeting, time for **discussion & interaction.**

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- **Before - preparation, by yourself or with others (or both)**
 - Create the POP
 - Set date, time, location
 - Identify roles that need to be filled & delegate thoughtfully to other leaders
 - Determine who should be in the room & how to invite them (“turn-out”)
 - **During**
 - Share the POP at the beginning - best to have it written somewhere
 - Follow the POP
 - **After - debrief, by yourself or with others (or both)**
 - Always start with positive question: What went well? (Pluses)
 - What could be improved, needs to be revisited? (Deltas)
 - Determine & plan any follow-up with attendees



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Welcoming meetings



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Welcoming meetings

What makes you feel welcome in a meeting?

What makes you feel welcome in a meeting?

- Familiarity - with those in the room, the organization, the location
- Other people are already there, say hello
- Clear seating arrangement
- Music playing
- Talking isn't dominated by one person
- Respectful environment
- Food, drinks



- **Arrive early!** to set up the room, start music, greet people
- Make the space **easy to access** - have someone by the door or post signs
- Plan time for **introductions** at the beginning
 - Include names, gender pronouns, any other important info
- Notice if certain people are dominating conversation (including yourself) & purposefully **invite others** to share input
- Co-create **group norms** for the meeting
- Encourage existing leaders to split up, talk to others



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Relational meetings



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Relational meetings

What does it mean to have a “relational” meeting?



What does it mean to have a “relational” meeting?

- Time built in to agenda get to know each other
- Share and connect over personal things - related to meeting or not
 - Current moment we're in
 - Stories of how we came into this work, what keeps us in it
 - Personal experiences
 - Life outside of “the work”
- Allows us to show up as **whole people**, beyond our work and productivity

- Purpose is to situate attendees with who is in the room & and get to know a little about each other
- **Check-in** = More than basic intro or icebreaker
- Includes name & gender pronouns plus additional question(s):
 - Can be serious
 - Can be silly
 - Can relate to the meeting or topic
 - Can be totally random!
- **Check-out** = Way to re-center everyone at the end of the meeting
 - Touch base with how folks are feeling
 - Can help gather intel

- Resonating is:
 - **Listening with the heart**
 - **Connecting with the emotion** of a person's story rather than a specific experience
- Resonating is not:
 - Giving advice
 - One-upping
 - Making meaning
- “I resonated with you when...” or “I was with you when...”



As the facilitator...

You are responsible for the team in this meeting. **OWN your role.**

- Manage the **energy of the room**
- Keep the **bigger picture** in mind - use POP
- Hold people to the **timeline** & allow for **flexibility** as needed
- Create **space** for those who want to participate
- Help process what's happening in the room
 - Ex: pointing out when the group is coming to consensus
- Invite others to take **responsibility in the work, step into leadership**

Things to avoid:

- Dominating conversation
- Thinking your ideas are the best (seriously)
- Side tracking the conversation with things too far outside the scope of the POP

When have notes been most helpful to you? (Meeting notes, class/discussion notes, etc.) What qualities make them helpful? What kind of information should they capture?

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- When have notes been most helpful to you? What kind of information should they capture?
- Make sure to record:
 - Attendance
 - Announcements (including date/time/location for events, who to contact with questions)
 - Report backs
 - Links that are dropped in the chat
 - Info about key points on the agenda
 - Action items (include who's responsible for what and any deadlines mentioned)
 - Questions asked/answers given
- **After the meeting, go back through the notes to pull out key takeaways and next steps and post the summary!**



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- Practice these skills
 - Learn what your personal style is over time
 - Listen to your instincts
 - And if you find that this role is not a good fit for you, invite others to do it!



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Template agenda

Use this template agenda for your PIH Engage meetings:

https://docs.google.com/document/d/1w_TgzUCuIkbi4lpbvp78wfNd6srbvvBQM_tTppiPf4/edit?usp=sharing



Create your agenda

- Think about a specific meeting you want to hold next semester. Make a copy of the [template agenda](#) and take 10 min to fill it out.
- Discuss your agenda with your partner (10 min)
 - What kind of meeting did you pick? What was difficult about making the agenda? What factors did you have to consider? Was using the template helpful?
- Share with the group (5 min)



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Tactics/Challenges **Brainstorm**

This is a time and space to share your challenge and for us to problem solve!

Q: How do we engage members in meetings virtually?

Q: How do I structure my leadership team?

Q: What if meetings get off-track or someone is dominating the conversation?

Q: What do I do if there are disagreements in the meeting?