



**Partners
In Health**

ENGAGE

How to Organize an Effective Meeting & Team

How to have effective, welcoming,
and relational meetings



-
- Effective meetings
 - Welcoming meetings
 - Relational meetings
 - Make your own agenda
 - Semester Structure
 - Shared Leadership
 - Challenges you are facing

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?





**Partners
In Health**

ENGAGE

Effective meetings



Partners
In Health
ENGAGE

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





-
- **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.**

-
- **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



**Partners
In Health**

ENGAGE

Welcoming meetings



Partners
In Health
ENGAGE

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



**Partners
In Health**

ENGAGE

Relational meetings



Partners
In Health
ENGAGE

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



Partners
In Health
ENGAGE

Template agenda

This template agenda might be useful for planning 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 5 min to fill it out.
- Discuss your agenda with your breakout sessions (8 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)

How can your meetings build upon previous ones?

How can you structure meetings to touch on all 3 pillars?

We'll send out sample slides after T1

Group discussion (10 min)

- What might people need to feel empowered to take on leadership?
 - Resources? Support?
- How can we make sure we are accountable to commitments we make? How can we encourage others to take accountability?
- What responsibilities/activities/projects can you encourage newer team members to take on?
 - what might that look like in meeting structure?



Partners
In Health
ENGAGE

Semester Structure

- Think about the campaign goals and your team's accomplishments last year. Make a copy of the [template schedule](#) and take 5 min to fill out a few sample meetings.



- 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!



Partners
In Health
ENGAGE

Tactics/Challenges **Brainstorm**

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



Partners
In Health
ENGAGE

Tactics/Challenges Brainstorm

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?



Partners
In Health
ENGAGE

Notetaker

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?

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?

- 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!**