“This meeting could have been an email.”

Make your meetings more effective and energizing
ARE YOU LONELY?
TIRED OF WORKING ON YOUR OWN?
DO YOU HATE MAKING DECISIONS?

HOLD A MEETING

YOU CAN....
✓ SEE people
✓ DRAW org-charts
✓ FEEL important
✓ IMPRESS your colleagues
✓ EAT donuts

ALL ON COMPANY TIME !!!

MEETINGS
...the practical alternative to work

I DON'T ALWAYS GO TO MEETINGS

BUT WHEN I DO, IT'S A COMPLETE WASTE OF TIME
THREE QUESTIONS

YOUR NAME
WHERE YOU WORK
WHAT DREW YOU TO THIS SESSION?

FIND FOUR THINGS YOU ALL HAVE IN COMMON
Meetings are a symptom of bad organization. The fewer meetings the better.

*Peter Drucker*

The longer the meeting, the less is accomplished.

*Tim Cook*

Our meetings are held to discuss many problems which would never arise if we held fewer meetings.

*Ashleigh Brilliant*

People who enjoy meetings should not be in charge of anything.

*Thomas Sowell*

A meeting is an event where minutes are taken and hours wasted.

*James T. Kirk*
BEST TEAM EVER!

Honor people.
Make it sparkle.
Go to them.
Listen.
TYPES OF MEETINGS

WHY DO WE BRING PEOPLE TOGETHER?
REASONS TO BRING PEOPLE TOGETHER

MAKE DECISIONS
SOLVE PROBLEMS
SEEK FEEDBACK
BRAINSTORM
EXCHANGE INFORMATION

If there is a decision to be made
WHEN NOT TO BRING PEOPLE TOGETHER

• To inform
• After a decision has been made
SEVEN TIPS FOR FACILITATING EFFECTIVE MEETINGS
Tip 1: Meetings should support decisions

- What is the decision to be made?
- How will this meeting support that decision?
WHAT IS THE DECISION/PROJECT?

• Who is the decision maker?
• What is the decision to be made?
• What is the timeframe?

How does this meeting support the decision?
DECISION STATEMENTS:

By February 2020, the Town Board will adopt a Parks Master Plan.

By February 2020, the Board of Directors will approve a strategic framework with six initiatives that will guide the organization’s activities for the year.
HOW MIGHT A MEETING NOT SUPPORT A DECISION?

• If a decision has already been made
Tip 2: Good facilitation begins before the meeting.
• Determine purpose of the meeting/engagement
• Engage internally to confirm the purpose
• Write the objectives/purpose of the meeting in a way those invited understand how important it is for them to attend
• Understand issues participants will bring
• Ask others internally to review the agenda
• Get comments on the agenda and revise
• Distribute the agenda to participants with reasonable lead time
• Develop meeting tools, such as recording templates, presentations, name tags, tent cards, etc.
• Finalize logistics
• Confirm who is taking notes
• Arrange for a neutral facilitator (if necessary)
• Call key participants to encourage attendance
WEAK OBJECTIVES

- Discuss the project
- Give project update
- Review the schedule
- Talk about design options
STRONG OBJECTIVES

• Develop and agree on 3 project goals
• Approve project schedule
• Identify design option that best meets criteria
Tip 3: Establish process authority
PROCESS AUTHORITY (VS. CONTENT AUTHORITY)

- Take a neutral position on content and outcome
- Engage on process before content
- Communicate your commitment to the process of deciding, not the outcome
Tip 4: Meta-communicate
### ANNOTATED AGENDA

- **Time**
- **Activity name**
- **Description**
- **Role**
- **Materials**

Manage the minutes!

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| 5:00 -  | Set-up                    | • Arrange circular tables  
| 6:00    |                            | • Sign-in sheet  
|         |                            | • Refreshments  
|         |                            | • Screen/Projector set up                                                  | Highland / BA | See materials list and room diagram           |
| 6:00 -  | Welcome & Introductions   | Welcome to participants  
| 6:10    |                            | • Introduce team  
|         |                            | • Purpose of the workshop  
|         |                            | • Review agenda  
|         |                            | • Transition to BA                                                       | Rich, Susan   | Hardy copies of agenda                       |
| 6:10 -  | Presentation              | • Background, 2009 report, traffic conditions,  
| 6:30    |                            | • Previous work of the Task Force  
|         |                            | • What it all means for today’s design parameters  
|         |                            | • Spell out design parameters                                              | Rich, Mark M., Dominic | Projector  
|         |                            |                                                                            |               | Screen                                        |
|         |                            |                                                                            |               | PPT presentation                              |
|         |                            |                                                                            |               | Microphone/PA                                  |
| 6:30 -  | Transition                | • Explain how break out groups will work, timing, etc                      | Susan         |                                               |
| 6:35    |                            |                                                                            |               |                                               |
| 6:35 -  | Small Group Exercise      | • Break out groups  
| 7:20    |                            | • Pre-prepared question template and instructions  
|         |                            | • Each table will self-facilitate                                         | Susan         | Roll out map for each table                  |
|         |                            |                                                                            |               | Flip chart                                    |
|         |                            |                                                                            |               | List of questions                             |
|         |                            |                                                                            |               | Design booklet*                               |
| 7:20 -  | Report out                | • Each group reports top three priorities                                 | Susan         | Flip chart and markers                        |
| 7:40    |                            |                                                                            |               |                                               |
| 7:40 -  | Wrap-up, next steps      | • Present next step in the scope and timeline for completion of the draft  
<p>| 7:50    | Adjourn                    | • Present time and location of future engagement opportunities, how to stay involved | Susan         |                                               |</p>
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• Spell out design parameters | Rich, Mark M, Dominic | • Projector  
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| 6:35     |                           |                                                                              |              |                                                       |</p>
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### At the Meeting

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<td>1:00 pm</td>
<td><strong>Meeting start</strong>&lt;br&gt;Facilitator convenes the group. This may be a few minutes after the start time if people are still arriving.&lt;br&gt;Ask everyone to find their seat. Introduce yourself.</td>
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|      | **SAMPLE SCRIPT:** “Welcome and thank you for coming today. My name is ________, I am a facilitator with xx firm. My job over the next two hours is to make sure we start and end on time and to make sure you have an opportunity to provide feedback. ..."
|      | First, I would like to acknowledge that there are a few members of the Planning Committees in the room [Facilitator introduces Planning Team (commissioners), Planning Committees]<br>I'll be back up here in a few minutes, for now I'm going to hand this over to Supervisor Jones to give you the official welcome and kick off this meeting.” |
| 1:10 | **Welcome & Introductions**<br>Facilitator hands meeting to Town Supervisor for welcome<br>Facilitator hands meeting to local or state official (or commissioner) who will welcome the group |
| 1:15 | **Presentation**<br>Jim to give presentation<br>Facilitator alerts presenter if he/she is past time allotted |
| 1:40 pm | **Q&A**<br>Facilitator moderates questions at front of room.<br>Rather than circulate a microphone, offer to repeat any questions that are asked. Facilitator does not need to answer questions. Technical team should be nearby to answer questions when prompted by the facilitator.<br>**SAMPLE SCRIPT:** “Before we transition to the discussion activity, we have about 5-8 minutes to take questions. Because we’ve reserved the remainder of the meeting for discussion, we would ask that while we’re in the large group, that we stick to clarifying questions about the project and what you just heard. I’ll repeat any questions so that everyone can hear them.”
|      | Limit Q&A to 10 minutes. If participants ask non-questions, or raise issues or concerns that are not questions, you can note that those are valid concerns, we are keeping note of them, and that you’d like them to save them for the discussion session, but that we need to move on in case there are any clarifying questions in the group. |
| 1:55 | **Transition to Small Group Discussion**<br>Facilitator explains the transition. Facilitator #2 hands out discussion guides. |
|      | **SAMPLE SCRIPT:** "We have roughly an hour remaining. Now we are going to move into the discussion portion of the meeting. Here’s how it will work. There are two things on your tables: (1) Maps and (2) Discussion Guides. There is a sheet in the discussion guide that looks like this [on screen]. This is a recording template. Your task is to work together as a table to fill out the recording" |
Tip 5: Manage space and energy
MANAGING SPACES

• Comfort
• Convenience
• Engaging space
• Security
MANAGING ENERGY
Tip 6: Stand in the fire
STRATEGIES FOR MANAGING CONFLICT

• Maintain process authority – don’t take a position!
• Find the middle ground
• Own up to the bad news (or current problems)
• Share control
• Apologize and/or acknowledge mistakes, then turn it forward
• Give away credit
GO TO THE HEAT

• Clarify and ask questions (“Tell me more.” or “Why?”)
• Permit venting of negative emotional energy
• Don’t provide facts
• Validate emotion
• Invite discussion
• Paraphrase (“So the issue is...” or “It sounds like what’s important to you is...”) If you didn’t get it right, the person will correct you
• Reframe
WHEN WAS THE LAST TIME YOU FELT TRULY HEARD IN A GROUP SETTING?

WHAT WERE THE CIRCUMSTANCES

WHAT DID IT FEEL LIKE?
Tip 7: Follow up and evaluate
EVALUATION METHODS

1. FIST OF FIVE
2. DELTA PLUS
3. RATE THIS MEETING
4. EVALUATION FORM
THANK YOU!

SUSAN HOPKINS CHARLAND, AICP
HIGHLAND PLANNING
HTTP://WWW.HIGHLAND-PLANNING.COM/