

# Nine Steps to Planning a Meeting

Did you know that effective meetings are one of the best tools to recruit new members and retain current members? In addition, effective meetings are good ways to train future unit leaders to ensure board positions will be filled. Yet many of us have memories of unit meetings or committee meetings that seem to last forever and no decisions were made, someone kept interrupting, the agenda was ignored, and everyone went home tired and unsatisfied. These situations negatively impact member participation and involvement.

While there is no magic wand to make every meeting more effective, they certainly don't have to be painful. Below are some considerations and suggestions that can add fun to meetings and make them useful and enjoyable. Remember: Planning and running meetings is a SKILL, not something you are born knowing how to do. Just as with any skill, you will get better with practice--and more confident, too!

Below are some considerations you should read. Following the considerations is a table that outlines four meeting phases with steps within each phase. Included are tips on what to do and reasons why the step is important. These are tried and true steps that will put you on the road to success.

Considerations:

- Effective meetings help your unit reach its goals
- Don't have a meeting just to meet! If there is not a clear goal then don't hold it. If you really don't need to meet, consider alternate ways to do the work such as Email or a phone conversation.
- Good meeting management is critically linked to member participation. It is through meetings that the unit is or is not able to get things done, solve problems, manage itself in a way that promotes inclusion and safety, and creates a sense of community
- The following steps for planning a productive meeting do not necessarily have to be done in the order listed. In fact, facilitators often work through a few steps simultaneously, with one exception: defining the meeting purpose and desired objectives always comes first.
- Four phases of meeting management: Planning for the meeting (Agenda and goals), Setting up the meeting (Logistics), Running the meeting (Chairing/Facilitating) Following up (After the meeting ends...) Appendix A contains a template for a unit meeting agenda and a unit board or committee meeting agenda.)

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## Phase 1: Planning the meeting

Put Date & Title of Meeting Here

Tips on achieving each step:  
Why it is important to achieve each step.

### Step 1. Clarify the goal/task of the meeting

What is the primary purpose of this meeting? Is it to revise the by-laws, plan the plant sale, or something else? No clear goal? No clear goal? A boring and unfocused meeting may result!

Write one-sentence describing the primary activity or purpose of the meeting. Use action verbs:

- Plan - planning or visioning
- Decide - decision-making
- Negotiate - problem solving
- Review - evaluating or tracking a program or process
- Other – team building, information sharing

Come up with a clear goal and the agenda becomes your road map to getting there.

### Step 2. Define the desired outcomes/objectives. Describe the expected results of the meeting.

Objectives can be tangible or intangible; task or process.

Task outcomes:

- A plan
- A solution
- A decision

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Process outcomes:

- Cooperation
- Commitment
- Motivation

Introduce more detail into your road map by defining the outcomes or objectives of the meeting. These will be the directions to attaining your goal. The desired objective should include a “so that” statement. For example, “Increased volunteering by members during the plant sale is necessary **so that** all plants are displayed for customers to view.”

**Step 3.** Determine who should attend. List the individuals that can help achieve the goals and objectives.

Such as individuals with:

- Vested interest
- Assigned role
- Relevant information
- Specialized knowledge

What preparations are required of each attendee?

- Review materials distributed before the meeting
- Deliver a report
- Bring materials to distribute at the meeting
- Lead a discussion

If you are working on a plant sale, does the whole membership need to attend or just the plant sale committee?

**Step 4.** Prepare the agendas:

Participants or Process. Delineate all the meeting components:

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A participant type agenda is clear and streamline with minimum information such as:

- Start and End Time
- Topic
- Objectives
- Discussion Topics
- Presenter

A process type agenda has detailed information the chair or leader needs to run the meeting such as:

- All activities
- All objectives
- All discussion or presentations
- All speakers
- All responsible parties
- All set up materials for each activity

The participant agenda is a brief summary, but the process agenda has the additional information meeting leaders need to ensure that the meeting runs smoothly. Putting together the detailed process agenda helps the meeting leaders think through the details of the entire session. (Appendix A contains a template for a process agenda.)

If the agenda is your road map, then make sure it has all of the stops listed on it, without too many unnecessary side trips. Let everyone know what's going to be discussed; don't keep it a secret!

**Step 5.** Distribute the agenda    Deliver the agenda in advance by email or snail mail.

Now that the agenda is complete, SEND IT OUT AT LEAST A WEEK AHEAD OF TIME. Members of any group should know what they are coming to do!

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## Phase 2: Setting up the meeting:

### Step 6. Determine logistics

Coordinate with the participants to set major features of the meeting such as:

- Date
- Location
- Start time
- End time

After the What, Where, When and Why (the 4 Ws) are worked out, you might answer the questions below to make sure meeting attendees are comfortable.

Though the location is determined, double check if it is this the most appropriate location? (Consider “territory” issues, convenience, comfort, accessibility.)

Is there a contact person for facility and logistical arrangements where the meeting will be held?

Given the starting and ending times are there adequate breaks in the agenda?

### Step 7. Design the meeting flow

List the sequence of meeting activities such as:

- Start time
- Estimated duration or allotted time for each agenda item or activity
- Include time for introductions and summaries of agenda items
- Include type of activity: report, speaker presentation or discussion
- Note responsible person of each agenda item
- Document if votes will be taken on unit matters

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It's disrespectful to abuse members' time and about the biggest turn-off there is! If you must start late because only three people are in the room when you're supposed to start, at least apologize! Better yet, get into the habit of starting on time EVEN if there are only three people in the room. Word will get around and eventually, people will come on time or won't come at all. If people keep showing up late, or not showing up at all, this may be a hint to change your meeting time, or your meeting pattern, or both.

## **Step 8.** Determine needs for equipment, supplies and refreshments.

List needs for each agenda item such as:

- Flip charts
- Markers
- Projectors
- Power cords
- Note cards

Avoid bumps in the road. In advance determine what kind of space, furniture, wall space (if needed for posters or flip chart notes), lighting, and audiovisual equipment does the meeting site have?

Is any additional equipment needed (audiovisual, displays, computers, etc.)?

Have arrangements been made for items the site does not have?

Have arrangements been made for food and beverages?

## **Step 9.** Set up the meeting room

List the meeting set up that best suits your agenda

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- Theater setup for presentations
- Horseshoe setup with chairs for facilitated discussions
- “U” setup with tables and chairs for working meetings

Meeting spaces should be comfortable and convenient. The room should be centrally located, and the right size for the size of your group. Get there early to set up and try to design the seating that best suits the meeting type. If the meeting space is hard to get to for seniors or others, try to arrange transportation or perhaps a volunteer "escort" service (a great teen/senior project!).

## Phase 3: Running the Meeting

Being a meeting chairperson is more than one task; it is many jobs in one. Below are steps to help you navigate ‘the running the meeting’ road.

### Step 1. Starting a meeting

- Welcome
- Introductions
- Icebreaker or warm-up activity
- Statement of meeting purpose (task)\*
- Statement of desired outcomes\*
- Background discussion\*
- Review or development of agenda\*
- Clarification of expectations
- Review or development of ground rules\*
- Assignment of roles

\* Asterisked item should be displayed in writing on chart paper or on a handout

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## **Step 2.** Focusing a meeting

One of the major challenges in leading a meeting is keeping the meeting focused on the purpose (task). Irrelevancies, tangents, interruptions and other things can throw a meeting off track. There are many ways to make sure the meeting adheres to the agenda:

- Lead the meeting through the agenda. Take charge. It is your meeting. You are the leader. Use a style of leadership appropriate to the purpose (task), the situation, and the willingness and ability of the participants. Share leadership roles with others and delegate some focusing activities to them.
- Introduce each agenda item, and state the time available and the desired result.
- Keep the discussion on track by referring to the following structures:
  - Purpose (task)
  - Desired outcomes
  - Agenda items
  - Ground rules
  - Roles
  - Time limits
  - Set process for each agenda item, e.g., problem solving steps, etc.
- Use a chart pad and an easel or another visual aid to focus attention.
- Start and maintain a “parking lot” list of important items not relevant to the present discussion.
- At the end of each agenda item, briefly:
  - Summarize what was accomplished or decided
  - Identify unfinished business and what to do about it
  - Check for clarity and agreement

## **Step 3.** Concluding a meeting

- Summarize decisions and accomplishments
- Compare results with the desired outcomes
- Identify unfinished business and suggest ways to address these issues



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- Complete an action plan that specifies who will do what by when
- Ask for feedback
- Thank people for their time and participation
- Adjourn the meeting

## Phase 4: Following Up on the Meeting

**Step 1.** Important meeting follow-up activities include the following:

- Write and distribute meeting minutes (could be sent by email to members)
- File or archive the agenda, minutes and other important meeting documents
- Monitor the carrying out of action items or assignments
- Review information or input from members to improve future meetings
- Set a time for pre-meeting planning for the next meeting

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## Appendix A

### Sample Meeting Agenda Worksheet

Meeting called by: \_\_\_\_\_ Date: \_\_\_\_\_

Participants: \_\_\_\_\_

Meeting place: \_\_\_\_\_

Start time: \_\_\_\_\_ End time: \_\_\_\_\_

Please bring: \_\_\_\_\_

Meeting purpose (task): \_\_\_\_\_

Desired outcome(s): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

[illegible]

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## Sample Unit Meeting Process Agenda

### Herb Society of America Hawaii Unit

Date	
<b>Attendance:</b> [It's good to keep track of who attends - and who is absent. Chronic absences are the sign of an unengaged member]	
Suggested time	Agenda
5 minutes	<b>Welcome, Introductions</b> [Always take time to introduce new members and guests]
5 minutes	<b>Minutes from Previous Meeting</b> – [Should be distributed prior to the meeting, or available for pick-up and perusal before the meeting begins] a. Corrections, Comments, Approval
5 minutes	<b>Treasurer's Report</b> – [Should show income and expenses current to the most recently-received bank statement. May also show “encumbered funds” (those funds dedicated to a project or program). Should also show bank account(s) balances.]
10 minutes	<b>Old Business</b> – [This is where you receive reports on pending projects, previous assignments, etc.] Report of standing committees Budget Education Horticulture Reports from ad hoc committees Plant sale Website
15 minutes	<b>New Business</b> – [This is where you discuss new projects and issues]

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10 minutes	<p><b>Optional topics:</b></p> <p>a. <i>Correspondence</i> – Can be summarized or read in detail, depending upon the importance to the unit. Can include requests for financial support, calls to action, and expressions of gratitude.</p> <p>b. <i>Upcoming Events</i> – Summary of events in planning - can include sign-up, volunteer tasks, discussion of opportunities or obstacles.</p>
minutes	<p><b>Other Business</b> – Be careful - if you leave your agenda too open-ended, you can get more than you bargain for. If you have members who regularly take meeting time with long discussions about topics not included on the agenda, you can regain control of your meeting by asking that all topics of discussion be placed on the agenda.</p>
3 minutes	<p><b>Next Meeting</b> – Don't forget to remind members of the next scheduled meeting!</p>