



## Meeting Planning Worksheet

This worksheet will guide you through important steps to designing a meeting.

<p><b>Purpose- Why are you meeting?</b></p> <p><i>This is the North Star that will guide each element of your meeting.</i></p>	
<p><i>To identify obstacles and openings, think about the probable <b>mindsets</b> (about meetings) of participants.</i></p> <p><i>eg: "There's so much else I need to be doing." or "I trust that diversity leads to better ideas."</i></p>	
<p><i>This meeting will have been successful if...</i></p> <p style="text-align: center;">~OR~</p> <p><i>By the end of this meeting...</i></p> <p style="text-align: center;">~OR~</p> <p><i>We'll leave this meeting with...</i></p>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>



### Who needs to be involved?

<b>Stakeholders<sup>1</sup> Potential Participants</b> Who has an interest in what will be discussed, developed, or decided?  <i>Who is:</i> <ul style="list-style-type: none"> <li><i>Affected by the issue?</i></li> <li><i>Connected to the solution?</i></li> </ul> <i>Who has:</i> <ul style="list-style-type: none"> <li><i>Information or expertise?</i></li> <li><i>Power or influence to facilitate or inhibit implementation?</i></li> </ul>	<b>Involvement</b> How can their interests best be represented?  <i>Do they need to be at the meeting?</i>  <i>Consulted beforehand?</i>  <i>Leading part of the meeting?</i>  <i>Providing information for the meeting?</i>	<b>Investment</b> What's in it for them? (WIIFM)  <i>How do they benefit from being involved?</i>  <i>What do they get out of it?</i>  <i>What's the consequence of them not being involved?</i>

### Considerations:

- ❖ Do you anticipate any challenges based on the above potential participants? What can you do prior to or during the meeting to prevent or address these challenges?
- ❖ Which voices might be missing? Any marginalized perspectives? How will you address this?

<sup>1</sup> “This term has a particularly violent connotation for tribes and urban Indian organizations. Preferred terms include community members and persons affected by [policy/program/practice]. Also avoid using stakeholder to mean partner; related terms to use include partners, collaborators, allies, community engagement, tribal engagement, urban Indian conferment (contact OTASA for technical assistance)” - CDC’s Health Equity Style Guide Aug 11, 2020



## Communication Considerations:

- ❖ How will people know they should/can come to the meeting? What communication methods will you use?
- ❖ What message(s) or tone will be most effective? (e.g.: *“Required”*; *“Have your voice heard”*; *“Become part of the movement”*; *“Hear the results”*; *“Learn how this impacts you”*; etc.)
- ❖ Who will deliver the message? Are there additional messengers? Or message reinforcers?



**Tip: Refer to your potential participants column. Communicate in way(s) that reach your potential participants. Articulate what’s in it for them.**



- ❖ What information needs to be shared before the meeting to be effective?
- ❖ If you are meeting virtually, what communication to participants is important to decrease any anxiety around using technology?
- ❖ Given your potential participants:
  - Is there background or contextual information that would be helpful or necessary prior to the meeting in order for everyone to engage to their fullest during the meeting?
  - What are their expectations of information or materials prior to the meeting?
  - What’s reasonable to expect will have been reviewed prior to the meeting, versus what should be covered during the meeting?



★ *Tip: Refer to your meeting purpose. What's needed to help achieve the goals for this meeting?* ★

## Logistic Considerations

- ❖ What location makes the most sense for the meeting? (e.g. on-site vs. off-site familiar vs. unfamiliar, room size and arrangement, amount of privacy, video/audio conferencing capability, etc.) ,
- ❖ If the meeting will be held virtually, what platform will you use? How familiar are meeting participants with the platform or meeting virtually? What kind of support will be available before or during the meeting for participants needing technical support?
- ❖ When should you hold the meeting?
- ❖ What other items might need to be addressed to achieve the desired engagement? (e.g.: food; transportation; childcare; etc.)

★ *Tip: Refer to your meeting purpose and potential participants.* ★

*You want to create the environment that gets the right people to the meeting and sets you up to achieve your goals.*

Notes:



## Agenda Openers

What will help get participants ready for the agenda items and supports the purpose of the meeting?

**Introduction Considerations:** What's important for participants to know about each other for the meeting to be effective?

- ❖ Are there new people in the room?
- ❖ How well do participants know each other (and is that true for everyone in the room)?
- ❖ Are titles, organization/agency or department affiliations important?
- ❖ Given the purpose of the meeting, how important is it that participants feel connected to each other?
- ❖ How much time does it make sense to spend on introductions – given the purpose of the meeting, the amount of time you have, and the number of attendees?

### Activity Ideas:

- Connection Question – in addition to their name, participants share the answer to a question intended to help build curiosity and learning about the individuals in the room on a more personal level:
  - Which famous person, alive or dead, would you like to have dinner with – and why?
  - If you were stranded on a desert island and could only have 3 things with you, what would they be?
  - If you were coming to a potluck, what would you bring?
  - What is something you are afraid of? What brings you comfort?
- Connection Challenge – 2-4 people talk for a determined amount of time and see how many things they have in common. Must be true about everyone in the group and must not include physical attributes (e.g., “we all have a head”, “we’re all wearing socks”).
- Paired introductions – meet the person sitting next to you, then introduce them to the group
- Get-to-Know-You Bingo (google it for lots of ideas!) – create a bingo card with facts that may be true about individuals in your group (e.g., “has more than 2 kids”, “likes to surf”, “has been in their job less than a year”, “speaks 3+ languages”, etc.). Each person walks around the room to find folks who can sign each square of their bingo card, when a statement is true about them.



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- “Stand Up If...” – read a series of statements that may be true about people in the room and ask folks to stand when a statement is true about them. (e.g.: “works in local government”, “works for the school district”, “is a parent”, “uses our public transportation system”).

**Notes:**



## Group Agreements

**Considerations:** What will be helpful for the purposes of this meeting?

- ❖ Have agreements already been established and need to be posted/reviewed? Are there new participants who need to be informed?
- ❖ What process will you use for establishing agreements?
- ❖ What types of agreements will be helpful for this meeting or group?
- ❖ Are there challenges you anticipate with this meeting or group? In what ways might agreements help you prevent or handle those?

Agreements can be long-term, established statements that guide the interactions of a group; or one-time guidelines created for a specific meeting's purpose.

### Sample Types of agreements:

- Behavioral – *this is how we act*
  - We put our phones on silent
  - We allow 1 person to finish speaking before we speak
- Functional – *this is what we do*
  - We start and end on time
  - We allow time for self-reflection and questions before moving forward with taking a vote on a decision
  - We show up to the meeting having read the materials sent out ahead of time
- Relational – *this is how we are with each other*
  - We speak from our own experience and use “I” statements
  - We utilize “oops/ouch” to encourage dialogue and discussion, while allowing space for making mistakes, voicing hurt, repairing, and learning.

**Notes:**



### Agenda Content

Content item	Who will lead?	What materials are needed?	How much time?
<b>Discussion Questions or Process Method:</b>			
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<b>Discussion Questions or Process Method:</b>			





## Considerations:

- ❖ What level of engagement/involvement do you need/want for each item on the agenda?
- ❖ How much time do you have?
- ❖ What do people need? To move around? Time to reflect? To hear different perspectives?
- ❖ What format(s) and process(es) will best serve your meeting purpose and be best suited for the mix of potential participants at your meeting?



**Tip: Consider including opportunities for individual reflection.**



*It can help avoid “group think” and allow thinking and processing time for quieter or slower-to-respond participants.*

## Process Ideas:

- **Brainstorming:** Can be done as a large group with all ideas recorded on a flipchart, or as individuals or in small groups with ideas recorded on post-it notes. Once all ideas are shared out, they can be grouped together to identify common themes.
- **Gallery Walk:** Post flipcharts around the room and have individuals or small groups rotate through the room to read or add to the flipcharts. This can be a good way to showcase different ideas for consideration (participants could add sticky notes with pros/cons/questions); or pose questions or collect issues related to the topic at hand (participants could write their thoughts on the flipcharts).
- **Speed Dating:** Form two lines of participants, facing each other. Pose a question to the group and have each pair of people standing across from each other respond and discuss. Set a timer and when it goes off, have one line



## Process Ideas (cont.)

stay still while the other line shifts down one person. The person at the “front” of the line, moves to take the last place in line. The new pairs can respond to the same question or a different one.

- TQE (Thoughts, Questions, Epiphanies): As folks hear information or proposals presented, have them write down their thoughts, questions, and epiphanies. These can then be collected and reviewed later or shared in small or large groups.
- Visioning: Encourage participants to approach an issue from a different perspective by having them vision the future. Pose questions that ask participants to “imagine if...” or “fast-forward to after the \_\_\_\_...” and ask them to describe what things would be like. Helping the group get a clear picture of what success or a positive end result looks like, can sometimes make it easier to then work backwards to identify and prioritize actions. This exercise can be done as a thought exercise, or you can have individuals or the group use markers, magazines, etc. to visually represent their desired future state.
- Whip-Around/Round-Robin: Pose a question and go around the room/table, allowing every person a chance to respond with no discussion. You may elect to offer a “pass” option for those who don’t want to respond.

## Evaluation Considerations:

- ❖ Will this group of participants meet again?
- ❖ Will you be holding a similar meeting with a different group of participants?
- ❖ What information or feedback would help your planning for next time?

## Evaluation Question Ideas:

- What suggestion would make our next meeting better?
- What worked well about this meeting?
- Did the meeting format work well for you? If not, what would you like to see changed?



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- Were you provided with the information you needed? If not, what information would you like to see provided next time?
- Any comments, suggestions, or ideas that you didn't get a chance to share during the meeting?

★ *Tip: Keep your evaluation brief! Make sure you are collecting information you will use.* ★

**Notes:**



*Agenda and Notes Template*

**Name of Meeting**

**Date, Time – Location**

**Meeting Purpose:**

**Attendees:**

Time	Agenda Item	Led By

**Notes:**

**Decisions Made:**

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**Next Steps/Action Items:**

Who	Will do What	By When	Why

**Future Discussion Items:**

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