Designing Effective Planning Meeting

Effective meetings can set your branch or state up for success, while ineffective meetings can leave you frustrated and directionless. So how do you make sure your meetings are fun and effective? Try the tips and tools below to lead your group to success.

Elements of Effective Meetings

As you plan for your meeting, keep attendees’ points of view front and center, and aim for your attendees to feel these four things when the meeting adjourns:

- **The meeting was consequential.**
  - Structure time around important decisions you need to make and discussions that are critical in moving projects forward.
  - Save report backs and updates for e-mail correspondence and take-home handouts.

- **The meeting was efficient.**
  - Maximize your time by asking attendees to prepare for discussions or read over documents ahead of time so that you can fast forward through getting everyone up to speed.
  - The more time efficient the attendees feel the meeting was, the more likely they are to return.

- **I mattered.**
  - Each attendee’s voice should be a part of the conversation and the decision making.
  - Use diverse activities and discussion formats to draw out the perspectives and ideas of all attendees. The more they get to contribute, the more bought in and excited they will be to take on responsibility.

- **I know what happens next.**
  - Make sure to set concrete next steps for projects with a plan for follow-up.
Your Role as Facilitator

Being the meeting facilitator does not mean you have to do everything yourself. But here’s what you should do to make sure the meeting is consequential, efficient, and inclusive.

- **Have a strong agenda.**
  - Invite attendees to contribute items to the agenda ahead of time.
  - Ask specific attendees to help lead or facilitate sections. Asking someone to lead a section builds leadership and investment in making the meeting a success.

- **Engage participants in meaningful ways.**
  - Be aware of who is contributing to conversations and who is not, and explore ways to invite the quiet folks to share their ideas.
  - You may find that changing the format — for example, creating opportunities for people to share in pairs or to get up and interact with the material — will bring out new voices.

- **Keep the group on track.**
  - Make sure the goals of the meeting are met and that the conversation doesn’t veer off course.
Anatomy of an Effective Meeting

Follow this format to ensure your meeting is a success.

1. Welcome and Overview of Meeting Purpose
   Start your meeting by welcoming everyone and thanking them for coming. Share the agenda and goals for the meeting — what will be accomplished by the end? What decisions will be made? Where will the group advance to in the larger process? This will help the group focus on the topics at hand.

2. Icebreaker
   Include an icebreaker in every meeting. Choose your icebreaker based on your specific need: to help strangers make new connections, to strengthen relationships, to prepare the group mentally for the topic to be discussed, or to energize a group that may be tired or unfocused. You can find icebreakers for in-person meetings on page 5 and icebreakers for virtual meetings on page 8.

3. Community Agreements
   Now that your attendees are warmed up, engage the whole group in ensuring that the rest of the meeting is productive and inclusive. Community agreements are norms for how the group will interact with each other when working together. The agreements do not need to be discussed each meeting after they are set, but you may want to reference them on your agenda to keep them fresh in people’s minds.

   You will find a list of helpful community agreements on page 9.

4. Discussions
   Go beyond “so, what do you think?” As a meeting facilitator, it is very easy to fall back on simply posing a big question to the group and waiting for answers. However, creative discussion builds buy-in and helps bring every voice forward. The more people feel a part of the process, the more they feel ownership. Different activities and formats can create space for people with different thinking and learning styles to contribute meaningfully.

   Research has shown that groups achieve a higher level of success when diverse voices are engaged in the process.

   You will find a list of different activities and formats to try on page 11.

5. Decisions
   At this point in your meeting, you have had a robust discussion on an important topic. Does the group need to make a decision? If so, check out various methods for making decisions on page 16.

6. Action Items and Closing
   Before you adjourn, make sure you reiterate action items by solidifying the task, who is going to do it, when it will be done, and how the person responsible will report back on it.
Using This Guide

On the following pages you will find examples and instructions for activities to help you plan and facilitate meetings. This is by no means an exhaustive list, but it will get you well on your way to having productive, effective, and inclusive meetings. The italicized text indicates handouts you will complete during the workshop.

### Anatomy of a Meeting

#### Part 1: Icebreakers

- Icebreakers for In-Person Meetings
- Icebreakers for Remote Meetings

#### Part 2: Community Agreements

- Setting Community Agreements

#### Part 3: Discussions

- Discussion Formats

#### Part 4: Decisions

- Decision-Making Methods

#### Part 5: Action Items and Closing

- Action Item Checklist
Icebreakers for In-Person Meetings

Use the chart below to determine which of the following icebreakers will work best for your group.

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<thead>
<tr>
<th></th>
<th>Making new connections</th>
<th>Strengthening relationships</th>
<th>Preparing for topic of meeting</th>
<th>Energizing the group</th>
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<tbody>
<tr>
<td>Commonality</td>
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<tr>
<td>Draw Four Things</td>
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<td>Free Association</td>
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<td>Line Up</td>
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<td>Longest List</td>
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<td>Name Tags</td>
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<td>One Unique Thing</td>
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<td>Buzzer Game</td>
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<td>Picture Metaphors</td>
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<td>Trading Cards</td>
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<td>Two Truths and a Lie</td>
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**Commonality**

This activity will help participants make connections based on things they have in common.

Break participants into two or more groups. Tell each group that they are trying to come up with things that they all have in common. This can be anything, from “we are all the youngest child in our family” to “we’ve all been to Mount Rushmore.” At the end of four minutes, have each group share their list. The group with the longest list wins.

**Draw Four Things**

This exercise is great for a group that is still getting acquainted and will work closely together over time.

Pass out one piece of paper to each participant, and distribute crayons, markers, or colored pencils. Ask participants to draw four things that represent themselves or that they care about. After giving them five to 10 minutes to draw, have each person share her drawing and her four things.
**Free Association**

This activity helps prepare the group for the topic that will be discussed and also reveals to the facilitator what people are thinking about the topic.

In this icebreaker, the group will generate as many words or phrases as they can about a particular topic related to the objective of your meeting. Give the group a key word you want them to associate and then give them two minutes to list as many words or thoughts that they can. For example, if you will be discussing a recruitment strategy, you could ask the group to do a free association on the word “recruitment.” In response participants may share their attitudes and challenges with recruitment, as well as potential methods, ideas, and target groups.

**Line Up**

This icebreaker is great for re-energizing a group and can also help a group learn things that they wouldn’t normally learn about each other.

Have the full group attempt to line up based on a category that you set. For example, ask the group to line up alphabetically by the name of the favorite place they’ve traveled, by arm length, or by number of years in AAUW.

Variations of this game include having two teams compete to complete the task first or asking the group to complete it silently. With smaller groups, you can repeat this exercise several times in a row with different questions.

**Longest List**

This quick, competitive game will help wake up a group.

Break the group into at least two teams and give them a topic to brainstorm a list on. Pick topics that are fun and simple, like “things you’ll find on a beach” or “objects that start with the letter j.” Tell them to write down as many things as possible in four minutes. At the end of the four minutes, have each group read out their list. The group with the longest list wins.

**Name Tags**

This is a great activity for a group that is meeting each other for the first time.

Prepare name tags for each participant ahead of time, and give each person someone else’s name tag as they come in to the room. Once the meeting starts, have everyone find the person whose name tag they have and ask that person to share a few facts about herself. Once everyone has her own name tag, have each person introduce and share what she learned about the person whose name tag she picked up.

**One Unique Thing Buzzer Game**

This exercise will help participants discover surprising things they have in common with others in the group, as well as learn interesting things about each other.
Ask each participant to think of something unusual or unique about themselves that they think nobody will have in common with them. Go around the group one at a time, and have each person share their unique thing. If someone else has that in common, they can buzz or beep in, and the person has to come up with another unique thing to say.

**Picture Metaphors**

This activity can be used to prepare the group for the meeting, either by getting them to think about the topic by understanding who else is in the meeting. It can also help the facilitator understand perspectives and potential challenges that may arise.

Before the meeting, collect a wide variety of photographs and images, ideally three per person. Place the pictures on a table or on the floor face up, so that everyone can see them. Ask each participant to pick an image based on a question prompt. For example, you may ask participants to choose an image that represents a hope for the day, an image they think is associated with the idea being discussed, or a strength that they are bringing to the meeting. Once everyone has chosen a card, ask each person to describe the image she selected and why.

As a variation to this activity, you can provide the prompt to participants ahead of time and ask them to bring an image to share.

**Trading Cards**

This creative activity is great for a new group or one that is still getting to know each other.

Give each participant a large index card or a piece of paper and pass out crayons, colored pencils, or markers. Ask each participant to create a personal trading card with a self-portrait, her name, a nickname, and one thing about herself that people in the meeting aren’t likely to know. You may decide to ask people to choose a nickname related to a strength they bring to the group or their particular role. Then have each participant share her completed trading card with the group, and expand on any questions about their nickname or personal fact.

**Two Truths and a Lie**

This classic icebreaker requires both imagination and detective work. It can be a great way to learn interesting facts about other participants.

Go around in a circle and have each participant share three things about themselves, two of which are true and one of which is a lie. After each participant shares, the group should guess which is the lie. This game usually spurs follow up conversation based on the interesting new things the group learns about the participant.

As a variation for a small group, have everyone mingle and interview each other about their three things before coming together as a group and guessing which thing for each person is the lie.
Icebreakers for Remote Meetings

While it is more difficult to facilitate icebreakers in remote meetings, starting your meeting with a fun question is a great way to build comradery (and give the late folks time to join the meeting). Try starting your meeting by having everyone answer one of the below questions:

**Future**
- What is something you are looking forward to in the next year/season?
- What is at the top of your bucket list?
- What is one place that you would like to travel?

**Past**
- When you were a kid, what did you want to be when you grew up?
- What was a highlight of the season/the last year?

**Favorites/about You**
- Share a favorite quotation and its meaning to you.
- What is the most memorable/awe-inspiring place you have been in nature?
- What is your favorite book?

**“If You” Questions**
- If you could only eat one food for the rest of your life, what would it be?
- If you could have dinner with one person, past or present, who would it be?
- If you could attend any event in human history, what would it be?
- If you could have any superpower, what would it be?
- If you had a personal slogan, what would it be?
- If you were an animal, what would you be and why?
- If you were an ice cream flavor, which one would you be and why?
- If you were stranded on a desert island, what three items would you want to have with you (besides necessities)?
- If you lived in any other period of history, when would you want it to be?
- If you won the lottery, how would you spend the money?

**Quirky**
- Describe a strange talent that you have.
- What is your greatest phobia?
- What is one thing that nobody in this meeting knows about you?
Setting Community Agreements

Now that your attendees are warmed up, you will want to engage the whole group in ensuring that the rest of the meeting is productive and inclusive. Community agreements are norms a group agrees to for how they will interact with each other when working together. They should be set at the beginning of a meeting to establish a collective understanding and buy-in for the behaviors and attitudes that will make the meeting effective and to build group accountability for following those norms. The agreements do not need to be discussed each meeting after they are set, but you may want to reference them on your agenda to keep them fresh in people’s minds.

To lead your group through setting community agreements, follow the steps below.

1. Explain that in order to have a productive meeting and get through the whole agenda, you would like the group to set community agreements. A community agreement is something that the whole group can agree to for the duration of the meeting in order to support the group working together effectively.

2. Ask the group to suggest community agreements and write them up on a flip chart paper that will be posted in the room. As each agreement is suggested, spend a minute clarifying meaning and checking to see if the group wants to add it to the list.

3. It is helpful for you as the facilitator to have some prepared community agreements that you would like to include. If the following agreements are not suggested by the group, share them with the group and add them to the list.

   - **Support timeliness:** As a group we are all responsible for staying on time.
   - **Use the parking lot:** If something comes up that we need to talk about but is not on the topic of the conversation at hand, write it in the “parking lot,” a space on flip chart paper or a notepad. The facilitator will make sure parking lot items are followed up on later.
   - **Speak from the “I” perspective:** Avoid speaking for others by using “we,” “us,” or “them.”
   - **Listen actively:** Listen to understand, not to respond. Sometimes we are tempted to begin formulating what we want to say in response, instead of giving 100 percent of our focus to the speaker. So let’s make sure we are listening 100 percent.
   - **Step up, step back:** If you usually speak up often or you find yourself talking more than others, challenge yourself to lean in to listening and opening up space for others. If you don’t usually talk as much in groups and do a lot of your thinking and processing in your own head, know that we would love to hear your contributions, and challenge yourself to bring your voice forward in the conversation.
• **Norm of self-correction:** Be responsible for monitoring your own behavior and adherence to these norms. If you realize you have disrupted a norm, share your correction with the group. For example, you might say “I realize I am talking a lot, so after this comment I am going to step back.”

• **Respect silence:** Don’t force yourself to fill silence. Silence can be an indication of thought and process.

• **Lean in to discomfort:** Learning happens on the edge of our comfort zones. Push yourself to be open to new ideas and experiences even if they initially seem uncomfortable to you.

4. During the meeting, remind the group of the agreements as needed. For example, before taking a break, remind the group of the norm of timeliness and ask everyone to be back and ready to go when it’s time to start again. If you hear people in the group using “we” instead of “I” statements, or notice that certain participants are monopolizing the conversation, gently reiterate the norm without singling anyone out.

If you are a group that will work together over time, it is a good idea to also set ground rules for the duration of your work together. This takes a bit longer but can support good working relationships from meeting to meeting. Once you have set them, keep them somewhere that everyone has access to and repost them at future meetings. In this case, you may include additional ground rules such as:

• Ask for help and give help if asked.
• Inform the group if unable to complete deliverables on time.
• Send out the agenda and prep work for meetings five days in advance of meetings.
• If unable to make a meeting, inform the group leader ahead of time, and be responsible for catching yourself up.
Discussion Formats

The below discussion formats are meant to be flexible. Adapt them or combine them with others to generate rich discussion.

Brainstorm

Brainstorming is a quick way to generate many ideas on a topic.

Pose a question to the group, and ask participants to offer responses within a given amount of time. The facilitator or a note taker should record contributions as they are shared. Each brainstorm idea should be new; do not allow for criticism or elaboration until the brainstorm has finished.

Circle of Voices

This activity gives space for each participant to express their thoughts in a substantive manner.

Break participants into small groups and give them a topic or question to consider. Give participants three minutes to silently reflect and collect their thoughts on a topic. Then, in turn, each group member will have three uninterrupted minutes to share their thoughts on the topic. After all group members have shared, other group members may react to the comments that have been expressed.

Fishbowl

The fishbowl format allows each participant to focus on contributing and listening in a meaningful way.

Ask a portion of the group to form a discussion circle and have the remaining participants form a listening circle around them. The inner circle will discuss questions or reflections on a specific topic, while the outer circle takes note of important points and trends. Rotate individuals between the circles to allow for everyone to participate. At the end, ask participants to share the important points or trends they heard.

Gallery Walk

This activity works well for engaging a large group of people and collecting tangible inputs.

Before the meeting, tape a number of large sheets of paper around the room. On these sheets, post questions that you want the group to discuss or visuals you want them to analyze. You may choose to repeat questions on several papers if you have a very large group. Pass out markers to participants and give them time to walk around and write answers to the questions on the papers. You may instruct them to do this silently, or allow them to chat quietly with one another if they will find it helpful. After about 10 minutes, ask everyone to stop writing and go read over what other participants have written before taking their seats. Finally, bring each paper up to the front of the room and take a few minutes as a group to record reflections, comments, and questions on each page.
**Go-Around**

The go-around gives each participant equal opportunity to briefly give input.

Pose a question to the full group, and ask each participant in turn for a short response. This can be used either to identify trends or to get a long list of unique ideas by asking each person to contribute something new.

**Open Discussion**

This is often the default method for discussion, but a bit of simple prep work can make it more effective.

Prepare an initial open-ended question to pose to the group for discussion, as well as follow-up or related questions. Encourage participants to be mindful of how much they are sharing, and create space for everyone to contribute. To facilitate this, you may want to have participants raise their hands and keep “stack”: Make a list of who wants to speak in the order that they raised their hands, then move down the list and call on people. You can also choose to limit the number of times someone can be on the stack, or jump stack to give priority to people who haven’t contributed yet. Just be sure to make the rules of stack clear before you start.

**Open Space**

The open space method is great for starting conversations on new topics. It builds a high level of investment and energy in the group because participants feel ownership over the meeting.

Before the meeting, select an overarching topic, or focusing statement or question for the discussion. At the meeting, ask participants to start by contributing topics for conversation that they would like to have and are willing to facilitate. Once all ideas are recorded, it may be necessary to combine or eliminate several topics so that each participant is not in a group by themselves. Then, participants break into groups based on which conversation they want to join, and the facilitator leads those discussions. During the discussion time, participants follow the “law of two feet” and may move freely between discussions. Finally, end by bringing the groups back together and having them share highlights and key learnings.

As a modified version of open space, you can prepare the topics of discussion ahead of time but still allow participants to float in and out of discussions as they choose.

For more information about the Open Space method, visit www.openspaceworld.org.

**Pair Stroll**

This activity is great to re-energize a group that has been sitting for a long time and if you want participants to be able to explore questions in-depth.

Pose a question to the group, and ask participants to get up and find a partner from somewhere else in the room. Those pairs should walk around and discuss their answers to the question. After a given amount of time, have everyone come back and discuss takeaways.
Room Thermometer

This activity is great for seeing what people’s perspectives are before diving into a deeper discussion.

Clear a large space in the room, and ask participants to stand. Explain that the cleared space is a continuum between two answers and that when you ask a question, they should move to the point on the “thermometer” that best represents their position. Pose a question — questions can be agree/disagree or two opposites — and have participants move to a spot that best represents their answer. Ask for a few participants to explain their position, and then pose a new question and repeat the process.

Small Group Discussion

Small group discussions can help bring out new voices in the room and energize participants in a meeting heavy with full-group conversations.

Break participants into smaller groups of three or more. Have the groups tackle specific questions on the topic at hand and record key points, preferably on flip-chart paper. Then bring the full group back together and ask each small group to share their key points. You can follow this by reflection of trends to help you move toward decision making.

Sticky-Note Brainstorm

This approach allows everyone to get involved and brings the energy up. It also prevents “group think” from taking over as it may during regular brainstorming.

Give each participant a stack of sticky notes and a pen or marker. Pose a question to the group and ask them to write one idea per sticky note. Then ask all participants to post their sticky notes on the board. (If you would like people to be able to contribute anonymously, collect all the sticky notes and post them up yourself.) Once all the ideas are posted, invite all participants to come up to the wall and read what is posted and begin clumping ideas together that are the same or related. Discuss the ideas as you organize them, and if needed, create new sticky notes to serve as headings for categories.

Think-Pair-Share

This is a good activity for drawing out the ideas of everyone in the room.

Pose a question to the group, and ask them to spend a couple of minutes thinking about and writing (if they want) their ideas on the topic. Then have the participants break into pairs to discuss the questions. Finally, bring the group back together and have each pair share what they came up with.

World Café

The World Café method is a great choice for meaningful dialogue in a large group.
Break the group into small groups seated around tables. Give each group a prompt or question to explore. The questions could be the same or different for each table, depending on your intended outcome. Ask each group to discuss and record main points on a piece of paper. Then have the groups rotate, with the option of leaving a “table host” who will fill in the next group on what happened in the previous round. At the new table, the group should read the notes of the previous group and continue the discussion. End the session by bringing the full group back together to share insights from the conversations.

More information about the World Café method can be found at www.theworldcafe.com.

**Writing or Journaling**

This pre-activity can prepare participants to share their ideas succinctly and to allow more-introverted participants time to collect their thoughts. It can be done before any other discussion activity.

Provide the group with the specific question or prompt and give them time to write their thoughts.
**Decision-Making Methods**

Decision making can be the most challenging part of a meeting, because it is when conflict may most clearly appear. But making decisions is integral for a group to be able to move forward, and the below methods can help you move through the process as painlessly as possible while ensuring that all participants feel validated and invested in the result.

### 20/20 Vision

This process can help a group prioritize a list of ideas through discussion.

Write proposed projects or priorities on large pieces of paper and tape them up on a wall in random order. If you are coming back to a list after some time has passed, have the group briefly discuss each project and priority to build a shared understanding of the idea. Then take the first two ideas off the wall and move them to a neighboring wall space. Ask the group to look at those two ideas and determine which of the two are more or less important. Post the one that the group generally agrees is more important above the one they generally agree is less important. Next, take another idea from the original list, ask the group to determine if it is more or less important than the two posted, and place it appropriately in the list. Repeat this process until all initiatives have been prioritized.

*20/20 Vision is borrowed and adapted from Gamestorming by Dave Gray, Sunni Brown, and James Macanufo.*

### Consensus

There are many versions of consensus decision-making processes, each with the aim of all participants agreeing that the decision is acceptable to pass, even if it is not their personal first choice.

Give participants green, yellow, and red cards. Green indicates agreement, yellow indicates neither agreement nor opposition, and red indicates opposition to the proposal. Ask participants to hold up a card in response to the proposal. If any red cards are held up, the group must continue to work on the proposal to come up with a solution that works for everyone. If yellow cards are held up, provide space for those participants to express their reservations, but the decision can still pass so long as no red cards were held up. If you don’t have time to make cards, the same process can be achieved with thumbs up, thumbs sideways, and thumbs down.

### Dot Voting

Dot voting can be an efficient way to make decisions between numerous ideas or priorities.

Write proposed projects or priorities on a flipchart paper. Give each participant either five sticky notes or a marker, and tell them that they can vote for five options. Let the group come up and mark their top five choices. Once all participants are done, tally the votes to determine which are ranked the highest. End with a discussion of whether these are truly the highest priorities and whether anything was accidentally left behind.
**Impact/Effort Matrix**

This method can help a group assess potential priorities for the potential impact and effort required.

Draw a two by two matrix on flip-chart paper or a board with “effort” on the X axis and “impact” on the Y axis. The midpoint of each line should represent five out of 10. Write proposed projects or priorities on pieces of paper and ask the group to discuss and place each idea on the chart based on effort required and impact potential. When you are done, the priorities in the top-left quadrant of low effort and high impact should be discussed as the potential ideas to move forward with.

**Majority Vote**

This method is best used as a final decision-making method after another decision-making activity.

Ask the group to vote on a choice, either anonymously or publicly. Before the vote (ideally while setting ground rules), determine whether a simple majority, a two-thirds majority, or a three-fourths majority is necessary to make the decision.

**Nominal Group Technique**

This prioritization process allows each participant to have equal say.

Start by creating a grid and writing the different choices or potential priorities across the X axis. On the Y axis, record the name of each participant. Ask participants to approach the grid and individually rank their preferences (where “1” is the top choice). After each participant has provided their ranking, lead the group through a discussion of each choice for a couple of minutes. After discussing each choice, give participants the opportunity to reorder their list into their final preferences. Then tally the results. Remember, since the number 1 is assigned to the top choice, the selection that earns the lowest score will be the group’s first choice. Discuss any final considerations of the top choices.

**Action Items**

Before you adjourn, always make sure you reiterate action items by solidifying:

+ **What** action needs to be taken
+ **Who** is going to do it
+ **When** it will be done
+ **How** the person responsible will report back on it