Welcome to

Planning a Productive Meeting
Session Goals

By the end of the webinar, you will be able to:

- Identify when a meeting is needed, and when it’s not needed
- Recognize the key components of an effective meeting
- Identify three types of meetings
- Manage the logistics of a meeting in person or at a distance
Today’s Speaker

Jewel Holly Ware
Jewels of Success
Today’s Focus

Planning/Preparing

Facilitation
Today’s Agenda

- Is a Meeting Necessary?
- Purpose
- Meeting Agenda
- Participants
- Logistics
- Key Roles
- Follow Up after the Meeting
What is a Meeting?

A gathering in which a purposeful exchange or transaction occurs among two or more people with a common interest, purpose, or problem.

James S. O’ Rourke, IV
Professor of Management,
University of Notre Dame
Chat Question

In what situations are meetings the most useful?
Flowchart

Should I Hold A Meeting?

Have I thought through this situation? YES → Do I need outside input to make progress? YES → Does moving forward require a real-time conversation? YES → Does this necessitate a face-to-face meeting? YES → Schedule and prepare for the meeting

NO → Schedule time for strategic thinking
NO → Schedule time for doing the work
NO → Send an email
NO → Use chat, call, or schedule a video conference

FROM “DO YOU REALLY NEED TO HOLD THAT MEETING?” BY ELIZABETH GRACE SAUNDERS, MARCH 2015 © HBR.ORG
Purpose

- Identify the objective
- "As a result of this meeting, we will have achieved ______."
- Meeting importance
- Specific outcomes for the meeting
Outcomes

- Ideal - Have 200 people attend
- Minimum - Have 100 people attend
Common Meeting Formats

- Informational
- Problem Solving
- Creating Buy-In
Poll Question

What type of meeting do you conduct or think you will conduct most often in your VISTA position?

A. Informational
B. Problem Solving
C. Creating Buy-In
Informational Meeting Format

To clarify a concept or a process and increase participant’s understanding of the situation

- Identify and organize key points
- Present information, using visuals
- Q & A
- Follow-up process for unknown answers to questions
Problem Solving Meeting Format

Process of generating a solution to a problem

- Define and clarify problem
- Brainstorm solutions
- Plan the solution
- Apply the solution
- Evaluate the solution
Creating Buy-In Meeting Format

Generate movement/action related to the issue:

- Bring attention to the area in question
- Identify the needs
- Satisfaction
- Visualization
- Action
Chat Question

In your VISTA service, what kinds of situations might you use a meeting to create buy-in?
Agenda

- Outline the topics to be discussed
- Prioritize
- Assign time frames
Participants / Attendees

- Stakeholders
- Provide needed information
- Approve the results
- Act as an advocate
- Represent divergent views
- Vital to the success of the decision/project
Chat Question

Name an element you think gets overlooked in virtual meetings?
Virtual Meeting Considerations

- Communication channels
- Familiar meeting tools
- Computer, tablet, phone
- Internet service quality
- Record meeting
- Use a tool that’s widely accessible and easy to use.
Virtual Meeting Platforms

- Attentiv
- Zoom
- WebEx
- GroupMe
- Slack
Virtual Meeting Tips

- Engage all attendees
- Include access details
- Provide contact information
- Design with a common visual focus
- Conduct a dry run
Virtual Meetings Tips (cont’d)

- Test connectivity
- Roll call
- Identify protocols for your meetings
- Mute phones
- State name prior to speaking
- Move at a slightly slower pace
- Have a backup plan
Logistics

- Date and time
- Scheduling tools
  - Doodle
  - Assistant.to
  - Calendly
  - Timebridge
Logistics (cont’d)

- Secure location
- Announcements / invitations
- Set up time
- Technology
- Transportation
- Child care
- Refreshments
Day of the Event Timeline

5:30 pm  Arrive at meeting site
5:45 pm  Arrange tables and chairs
6:00 pm  Set out agendas, handouts
6:15 pm  Set out refreshments
6:30 pm  Open doors, welcome people
7:00 pm  Meeting starts
Invitations and Reminders

- Information to include
- Timing
- RSVP
- Reminders
Roles

- Recorder
- Time Keeper
- Facilitator
- Other: Helper, Runner, Additional Support
Follow Up

- Thank participants
- Provide follow-up communication
- Share next steps and action items
Reflect

- Results
- Feedback
- Lessons learned
Next steps

- Identify a meeting and its purpose
- Decide who will need to attend and if it will be in-person or virtual
- Apply one of the meeting formats mentioned in this webinar (Informational, Problem Solving, or Creating Buy-In)
- Develop and send out the invitation for the meeting
- Review resources in the PDF of this webinar
Evaluation

- Please take a few moments to share your feedback through the poll on the right side of the screen. (make sure to **scroll down** to answer all the questions before submitting your response)
- How can we improve these sessions? What topics should we include in future webinars?
- Thank you very much for your time and participation!
Questions ✅

- To ask a question verbally, call in using the number on this slide and press *1
- To ask a question electronically, use the Q&A feature located in the bottom right corner of the screen. Please ask “All Panelists”
Thank You for Your Participation!

If you have further questions or for more information, contact us:
VISTAwebinars@cns.gov

Our next webinar:
Managing Up: Navigating Your VISTA-Supervisor Relationship – 10/19
Starting off Right: Professional Workplace Success – 10/24
2:00pm Eastern

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