

Meeting Plan for _____

WHY

Meeting purpose: *What 2-3 words sum up the purpose of the meeting? There may be multiple whys, and ideally, you would link them to a wider goal or purpose. You might say “We meet to ____ so that ____”*

WHAT: OUTCOMES	WHAT: TOPICS	WHAT: NON-TOPICS
<p>Desired outcomes of this meeting: <i>These items should directly relate to the “Why” of the meeting.</i></p> <ul style="list-style-type: none"> • What should be DONE by the end of the meeting? • What decisions need to be made? • What actions need to be determined or completed? 	<p>Big topics to address: <i>These topics or tasks should align with the desired outcomes of the meeting</i></p> <ul style="list-style-type: none"> • Start these with action verbs such as decide, request, solicit, remind, share or brainstorm • Put them in priority order; do first things first • Estimate the time needed to do each item 	<p>Not to be addressed: <i>List what won’t be discussed or done at this meeting</i></p> <ul style="list-style-type: none"> • What is non-negotiable or off-topic? • What can you share in other ways? • What can you delegate to another person or group? • What can be deferred to another time?
HOW: QUESTIONS	HOW: ACTIVITIES	HOW: BEHAVIORS
<p>Questions to ask: <i>What questions will help people engage and focus on the big topics?</i></p> <ul style="list-style-type: none"> • Start the meeting with a question that will connect people to themselves, the topic and each other, and they will speak up more later • Craft curious, open-ended questions • Share the questions with participants ahead of time 	<p>Processes to use: <i>What activities will help everyone contribute? What can you do besides presentations and large group discussions?</i></p> <ul style="list-style-type: none"> • Try moments of silence before discussions • Discuss things in pairs or small groups before discussing with everyone; this will both save time and encourage engagement. • Find alternatives at LiberatingStructures.com 	<p>Desired Behaviors to adopt: <i>What behaviors will best support the outcomes of this meeting?</i></p> <ul style="list-style-type: none"> • Do your meeting rules (e.g., Robert’s Rules) serve you or do they get in the way? • Ask the group what helps them to contribute and adopt those as your meeting rules • Print desired behaviors, values or mission on the agenda
WHO: PARTICIPANTS and LEADERS	WHO: PREPARATION	WHEN and WHERE
<p>Primary contact: <i>Agenda creator or meeting leader</i></p> <p>Participants: <i>Who is essential to achieving the desired outcomes? Is this open to the public?</i></p> <p>Non-participants: <i>Who need not attend all or parts of the meeting?</i></p> <p>Topic leaders: <i>Who will lead each topic?</i></p>	<p>Preparation: <i>How should participants and leaders prepare for this meeting?</i></p> <ul style="list-style-type: none"> • What do they need to read or do before the meeting? List resources and provide links. • What do they need to bring? • What do they need to come ready to do? Say it in your meeting invitation. 	<p>Meeting date: <i>Day and date to avoid confusion</i></p> <p>Start time: <i>Add time zone if needed</i></p> <p>Duration: <i>Minutes or hours</i></p> <p>Location: <i>Online, hybrid, in person</i></p> <p>Access instructions: <i>Meeting link or room number</i></p>



Save time in meetings and get better results! Invest 15 minutes filling out this template and you will collectively save hours.
Need help planning and executing an engaging meeting that makes a difference? Contact Barb Bickford at bickfordcollaboration.com
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Desired outcomes of this meeting:

WHAT: TOPICS

Big topics to address:

WHAT: NON-TOPICS

Not to be addressed:

HOW: QUESTIONS

Questions to ask:

HOW: ACTIVITIES

Processes to use:

HOW: BEHAVIORS

Desired Behaviors to adopt:

WHO: PARTICIPANTS and LEADERS

Primary contact:

Attendees:

Topic leaders:

WHO: PREPARATION

Before the meeting:

Come ready to...

WHEN and WHERE

Meeting date:

Start time:

Duration:

Location:

Access instructions:



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