Planning and Managing Meetings

This page is an output of the Itana Spring Face2Face 2016 meeting, contributed to the Itana wiki by the meeting attendees.

Architecture Leadership > **Planning and Managing Meetings**



Links

- liberatingstructures.com

Contributors

- (to be completed)

Definition

Understanding and classifying the goals of an engagement for the purpose of designing a meeting structure best suited for achieving those goals. Factors for classification include, persuasive vs shared vision, generating outcomes vs artifacts, …

Planning a meeting ideally involves describing the facilitation techniques that will best realize the objectives for the identified participants.

Outputs

1. The goals/purpose are well defined (what will people leave with?)
2. Type of meeting is defined based upon goals desired
3. The techniques for achieving the goals are identified
4. The right people are engaged
5. The rules for participation are clear
6. The schedule and plan for activities are defined and appropriate to the topic and goals
    a. Facilitator's Guide
7. Meeting schedule, frequency, and level of commitment are appropriate to the goals.
8. Any meeting participant pre-work has been defined and communicated. Sufficient context has been provided. Materials have been provided.

Storyboard

Chart of meeting techniques matched to the meeting type, purpose and objectives they are suitable for achieving.
Small, medium,large/light weight, medium weight, heavy weight

Shared vision vs persuasion

Context

- Relationship Building
- Strategic Planning
- Persuasion
- Product Working Session - targeted outcome
- Exploration/Analysis/Information Gathering
- Decision Making/consensus building
- Status/information sharing
- Education/outreach/evangelizing/understanding business areas

Examples

- For example, if the goal is to generate ideas from with the participation of the majority of the people in the group, liberating structure's 1-2-4-ALL is a good way to do so in a short amount of time.

Source Material

Activities

There are many guides for planning and managing meetings. Some of these are applicable to EA in higher ed. Many are not. Some that have been touched on in this discussion include the following:

- Meeting activity techniques enumerated in liberatingstructures.com (managing)
- Techniques as used in U. Wash [link] (Planning)
- What? So What? Now What? (Managing)
- To… In a way that… so that… (6 interrogatives: who, what, when, where, how, why) (Managing)

Managing best practices

Best Practices for all meeting types:

1. Punctuality (allowing for people's constraints, e.g., having to travel across campus from another meeting)
2. [examples of handling digressions, or slippage]
3. [examples for handling parking lot]
4. [examples for handling locked contention]
5. Note: this doc should touch on practices for adapting to events that come up within the meeting (planning, managing). Planning could allow for fallback activities. Planning could involve pro-active work to mitigate the risk, e.g., check in with a participant in advance if their contribution is critical to the meeting.

When the right people are not available or the people are not prepared, it may be okay to end the meeting early. But, depending upon the importance of the relationship, it may be better to use some of the meeting to ensure that a subsequent meeting can be successful e.g. by clarifying goals and expectations.

Related Skills

Ideally, the meeting contributors are different from the facilitator. A neutral facilitator can keep the meeting from seeming too heavy-handed.

If a separate facilitator is not available, it is important that the facilitator clarifies that role and is transparent.

Possible Next Steps