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The Art of Meeting Facilitation

June 29, 2022

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- Workforce Evaluation Consultant
  - Illinois Center for Specialized Professional Support
- Background in non-profit leadership and development, workforce development, and fundraising
- mcook12@ilstu.edu

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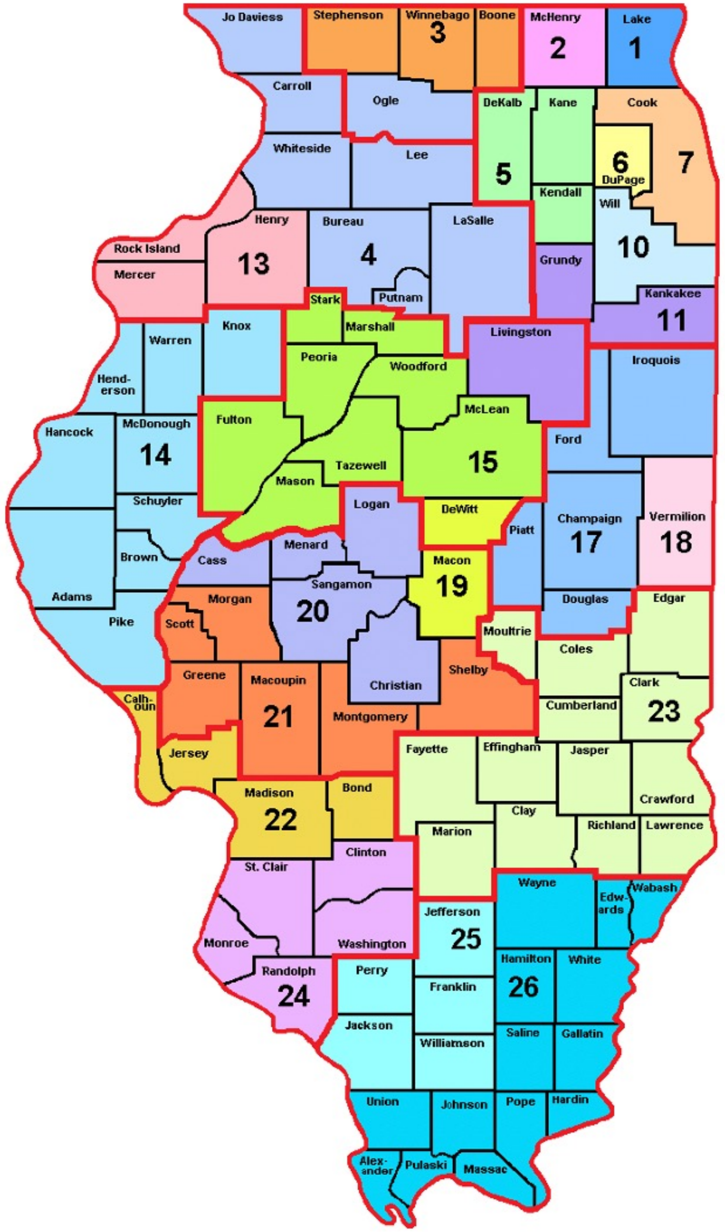
Where is Your Local Area?


Jo Daviess
Stephenson
Winnebago
3
Boone
McHenry
2
Lake
1
Carroll
Ogle
DeKalb
Kane
Cook
Whiteside
Lee
5
6
DuPage
7
Kendall
Will
Henry
Bureau
LaSalle
Rock Island
13
4
10
Mercer
Grundy
Stark
Putnam
Kankakee
11
Knox
Marshall
Warren
Livingston
Peoria
Woodford
Iroquois
Hend-erson
McLean
Fulton
Hancock
McDonough
Ford
14
15
Tazewell
Mason
Schuyler
Logan
DeWitt
Vermilion
Piatt
Champaign
17
18
Menard
Brown
Cass
Macon
19
Sangamon
Adams
Morgan
Douglas
Edgar
20
Pike
Scott
Moultrie
Coles
Greene
Macoupin
Christian
Shelby
Clark
Calh-oun
21
Cumberland
23
Montgomery
Fayette
Effingham
Jasper
Jersey
Madison
Bond
Crawford
22
Clay
Marion
Richland
Lawrence
Clinton
St. Clair
Wayne
Wabash
Jefferson
Edw-ards
25
Monroe
Washington
Hamilton
White
Randolph
Perry
26
24
Franklin
Jackson
Williamson
Saline
Gallatin
Union
Johnson
Pope
Hardin
Alex-ander
Pulaski
Massac

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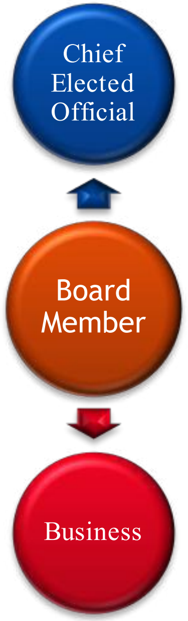
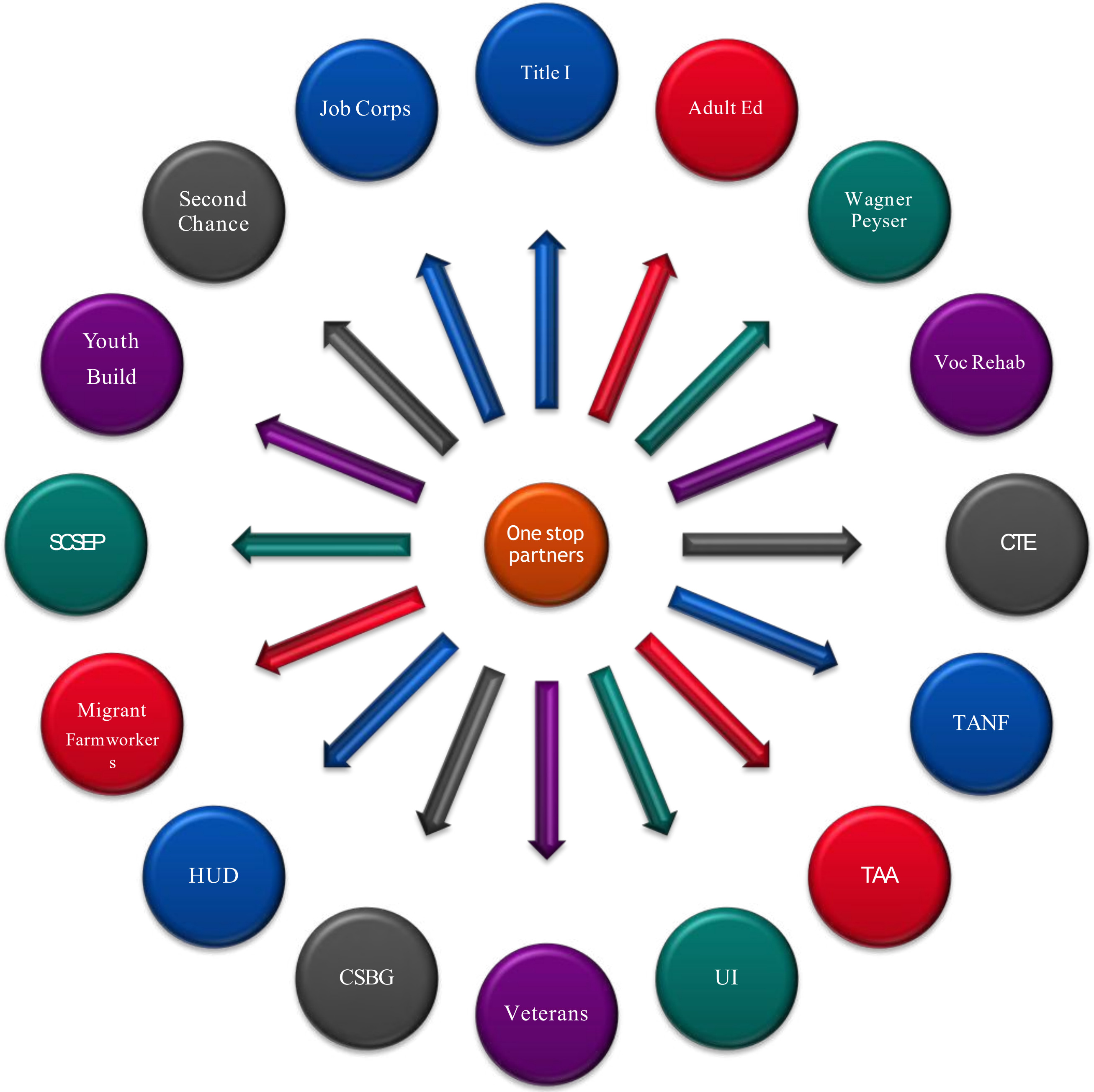
Which partner do you best represent?


Chief Elected Official
Board Member
Business


One stop partners
Title I
Adult Ed
Wagner Peyser
Voc Rehab
CTE
TANF
TAA
UI
Veterans
CSBG
HUD
Migrant Farmworkers
SCSEP
Youth Build
Second Chance
Job Corps

Agenda

Meeting Preparation

Types of Meetings

Learning Styles

Chat

Think back to a meeting that you attended that felt like a ‘bad’ meeting. What made that meeting a ‘bad’ meeting?

Chat

Think back to a meeting that you attended that felt like a ‘good’ meeting. What made that meeting a ‘good’ meeting?

Meeting Preparation

PREPARATION
IS THE KEY

Meeting Preparation Steps

1. Prepare an agenda
2. Determine a facilitator
3. Send a calendar invite
4. Consider time allotment
5. Consider pre-work
6. Coordinate content

1. Prepare an agenda

Stick to time allotments

Provide an overview/questions for each content item

Time	Content	Presenter
10:00 AM	Welcome and Introduction	Marlon McClinton
	Approval of the May 18, 2022 meeting minutes	
10:05 AM	Transportation, Distribution and Logistics Discussion • Overview of TDL report findings • Discussion – recommendations based on TDL findings	Marlon McClinton Mike Baker
10:30 AM	Evaluation Workgroup Update: Review feedback discussed during the last meeting, review next steps.	Aime’e Julian Molly Cook
10:45 AM	Performance Workgroup Update: Discuss timeline for future performance updates	Jay Brooks
11:00 AM	Statistical Adjustment Model Update	Brian Richard
11:15 AM	New Business / Old Business	Marlon McClinton
11:25 AM	Public Comment	Marlon McClinton
11:30 AM	Adjournment	Marlon McClinton

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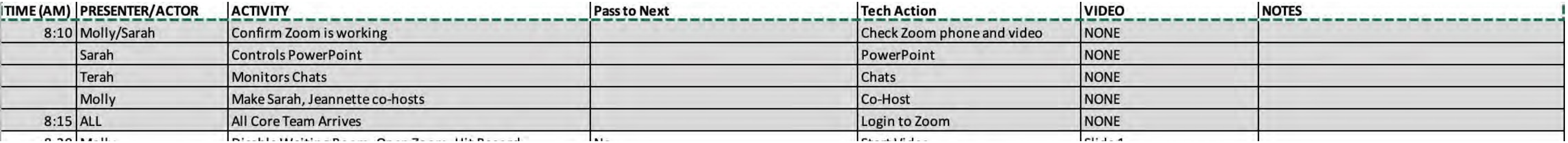
2. Determine a facilitator

- Who will take notes?
- Who will run the PowerPoint?
- Who will be a time-keeper?

3. Run of Show

- Time
- Presenter
- Activity
- Pass to Next
- Tech Action
- Video
- Notes



TIME (AM)	PRESENTER/ACTOR	ACTIVITY	Pass to Next	Tech Action	VIDEO	NOTES
8:10	Molly/Sarah	Confirm Zoom is working		Check Zoom phone and video	NONE	
	Sarah	Controls PowerPoint		PowerPoint	NONE	
	Terah	Monitors Chats		Chats	NONE	
	Molly	Make Sarah, Jeannette co-hosts		Co-Host	NONE	
8:15	ALL	All Core Team Arrives		Login to Zoom	NONE	

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4. Send a calendar invite and consider time allotment

Ensure timing works for all facilitators first

List the meeting for 15 minutes longer than you anticipate

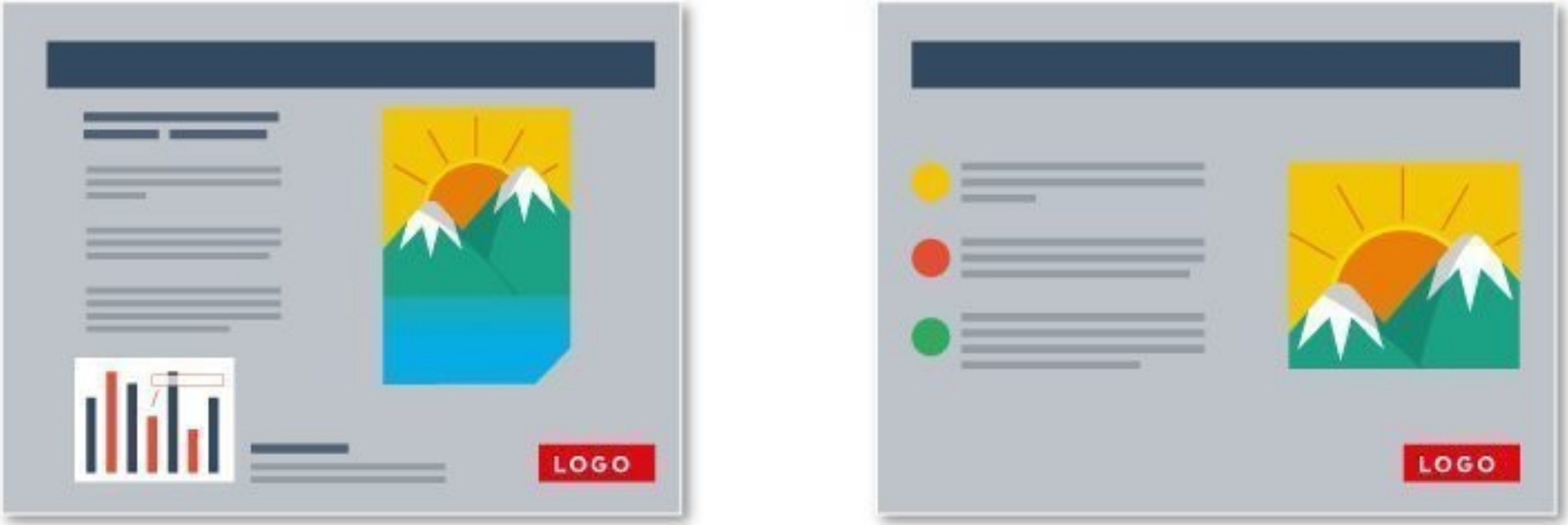
If looking for a date, consider tools like Doodle or a Survey Monkey

Attach a statement:

- For disability accommodations (e.g., sign language interpreters, alternative formats, etc.) please contact [Molly Cook, mcook12@ilstu.edu] as soon as possible.

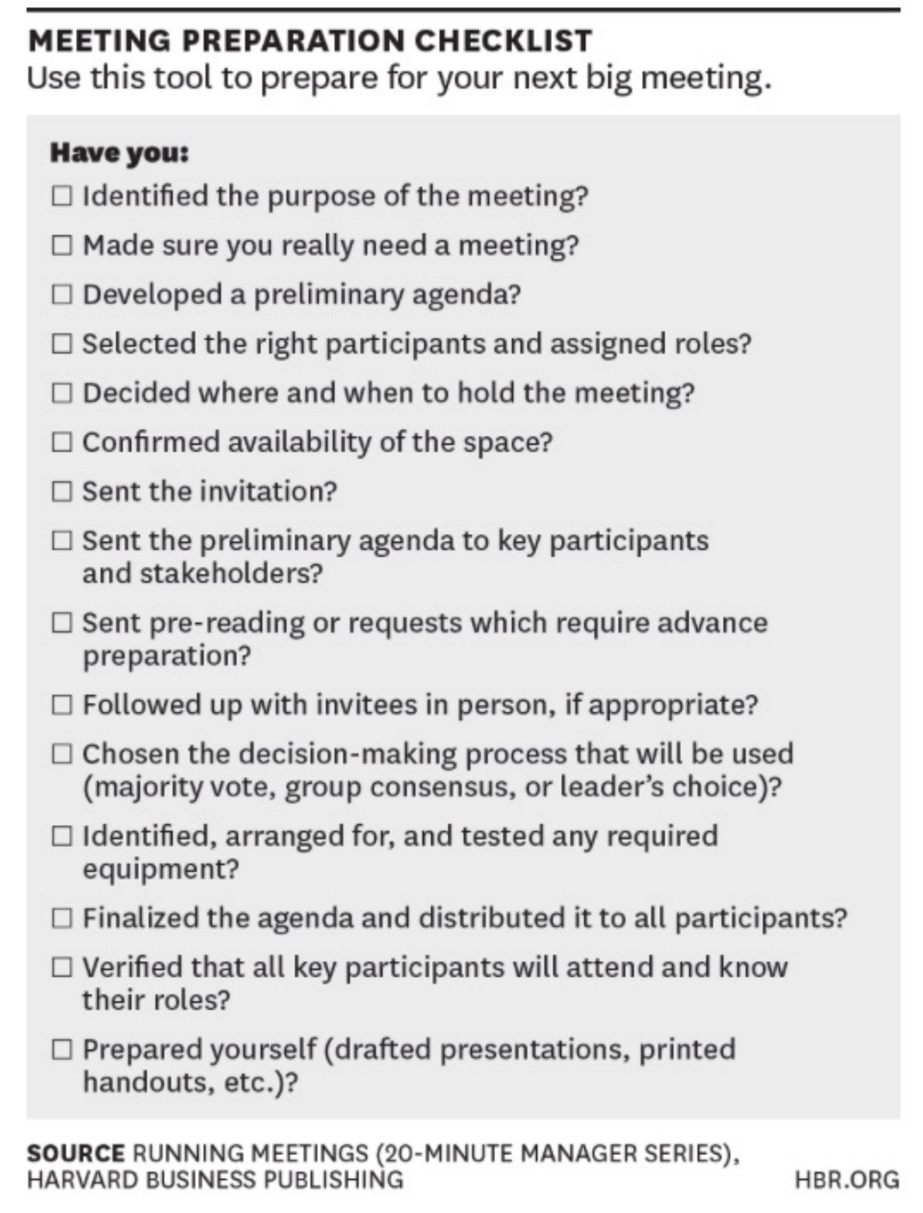
5. Pre-work

6. Coordinate Content



Consider spacing and avoid overcrowding

Source: Peregrine Communication



MEETING PREPARATION CHECKLIST

Use this tool to prepare for your next big meeting.

Have you:

☐ Identified the purpose of the meeting?
☐ Made sure you really need a meeting?
☐ Developed a preliminary agenda?
☐ Selected the right participants and assigned roles?
☐ Decided where and when to hold the meeting?
☐ Confirmed availability of the space?
☐ Sent the invitation?
☐ Sent the preliminary agenda to key participants and stakeholders?
☐ Sent pre-reading or requests which require advance preparation?
☐ Followed up with invitees in person, if appropriate?
☐ Chosen the decision-making process that will be used (majority vote, group consensus, or leader's choice)?
☐ Identified, arranged for, and tested any required equipment?
☐ Finalized the agenda and distributed it to all participants?
☐ Verified that all key participants will attend and know their roles?
☐ Prepared yourself (drafted presentations, printed handouts, etc.)?

SOURCE RUNNING MEETINGS (20-MINUTE MANAGER SERIES), HARVARD BUSINESS PUBLISHING

HBR.ORG

Source: Harvard Business Review

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Workplans

Driver/Anchor	Deliverable	Status	Timeline

CPTP Disability Workgroup

Charge:
Identify and provide strategies and recommendations for eliminating barriers to ongoing employment for individuals with disabilities.

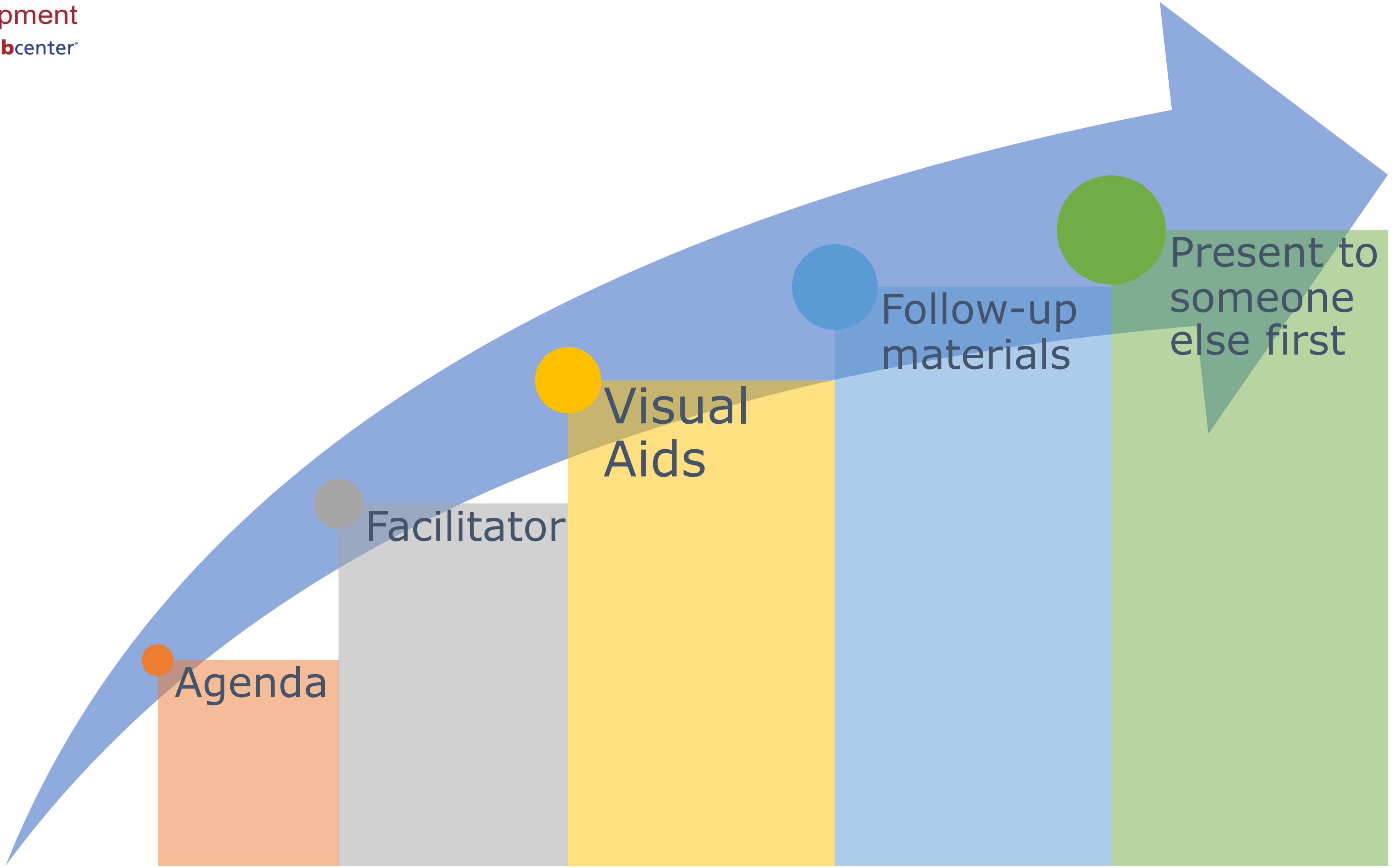
Priorities:

•*Service integration:* Highlight opportunities for funding, collaboration among agencies, best practice business models, referrals, etc.

•*Career pathway awareness:* Align focus and priorities around career pathways that support ongoing employment for individuals with disabilities

•*Continuous improvement:* Identify opportunities for ongoing improvements in collaborative efforts, awareness raising opportunities, and advocacy

Tips for Presenting Complex Information



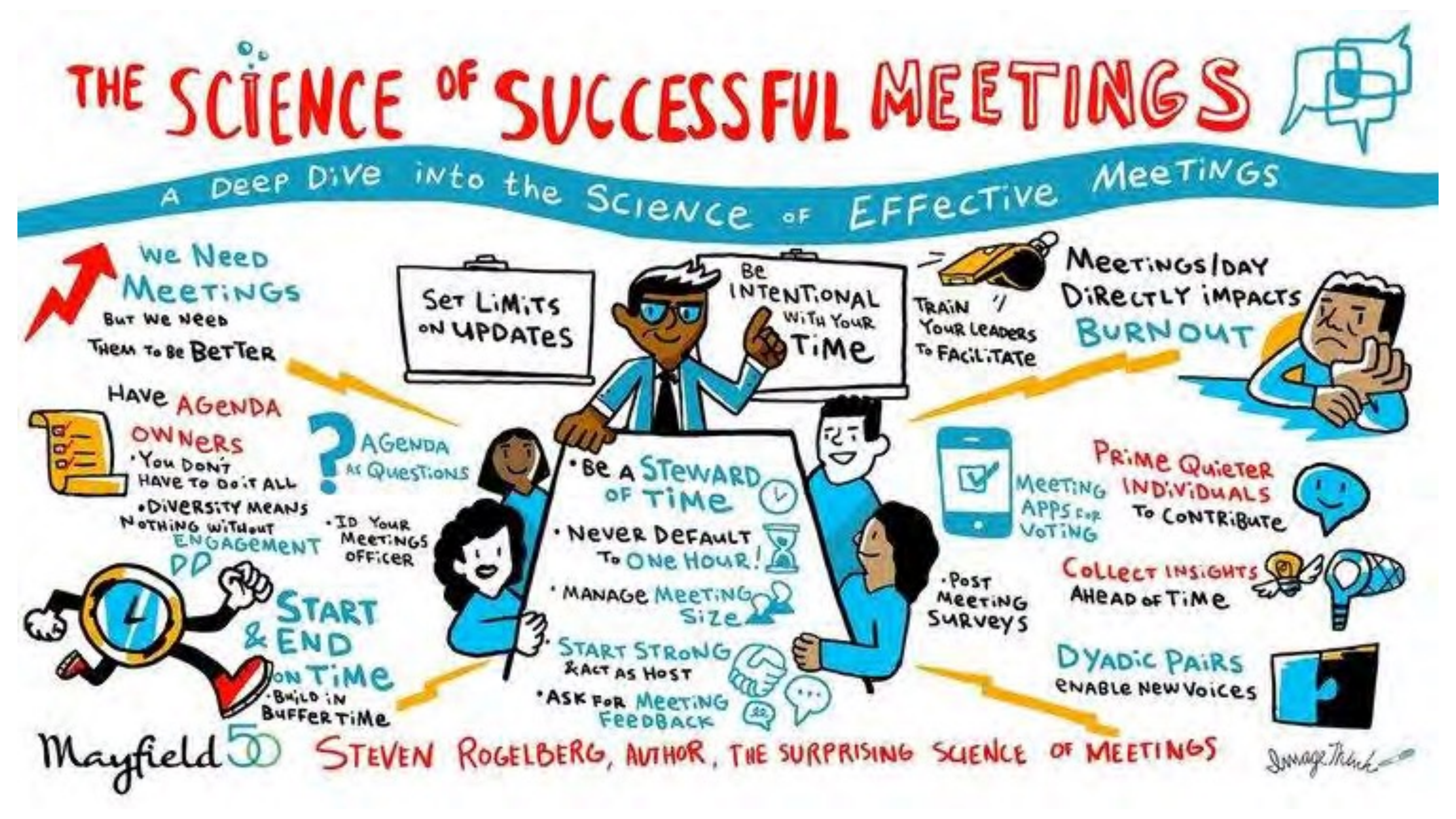
Agenda

Facilitator

Visual Aids

Follow-up materials

Present to someone else first


THE SCIENCE OF SUCCESSFUL MEETINGS
A Deep Dive into the Science of Effective Meetings
We Need Meetings But We Need Them to Be Better
Set Limits on Updates
Be Intentional With Your Time
Train Your Leaders To Facilitate
Meetings/Day Directly impacts BURNOUT
Have AGENDA OWNERS
• You Don't Have to Do it ALL
• Diversity Means Nothing without Engagement
AGENDA AS QUESTIONS
• ID Your Meetings Officer
• Be A Steward of Time
• Never Default To One Hour!
• Manage Meeting Size
• Start Strong & Act as Host
• Ask For Meeting Feedback
Meeting Apps for Voting
Prime Quieter Individuals To Contribute
• Post Meeting Surveys
Collect Insights Ahead of Time
START & END ON TIME
• Build in Buffer Time
Dyadic Pairs enable New Voices
Mayfield 50
STEVEN ROGELBERG, AUTHOR, THE SURPRISING SCIENCE OF MEETINGS
ImageThink

Sources: https://www.stevenrogelberg.com/
Jennifer Philips, LEAD series, link here

Types of Meetings

Types of Meetings

UPDATES

DECISIONS

DISCUSSION

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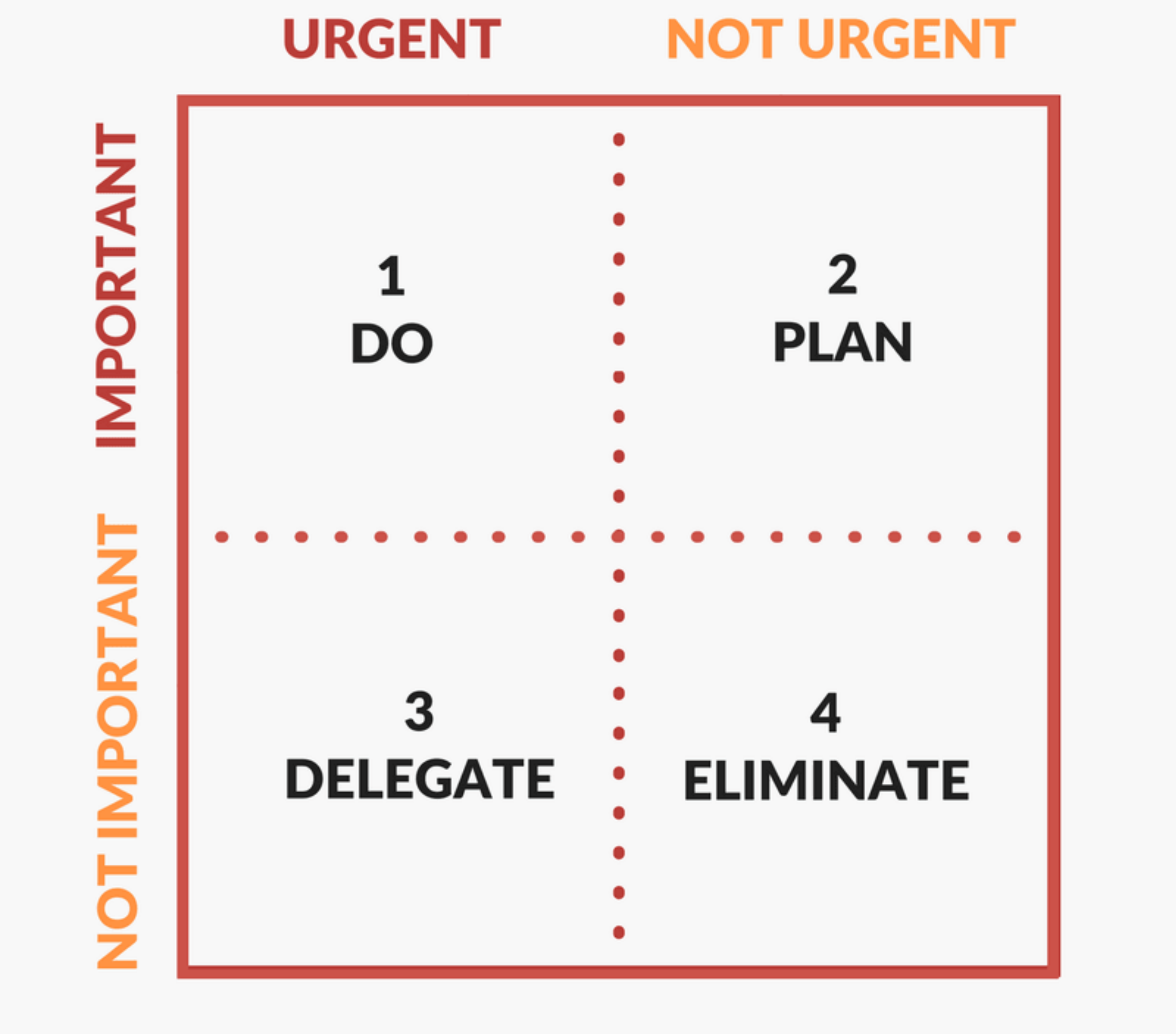
Updates



	URGENT	NOT URGENT
IMPORTANT	1 DO	2 PLAN
NOT IMPORTANT	3 DELEGATE	4 ELIMINATE

Source: https://fimatix.com/blog/the-difference-between-urgent-and-important/

Decisons

Discussion

Tips and Tricks for Meeting Flow

- Avoid overcrowding the agenda
- Send questions in advance
- Don’t forget introductions
- Is there a way to start the conversation
  - A chat question
  - Poll
  - Roses & Thorns
  - Quote

Chat

Are there any tips or tricks you use to help with meeting flow?

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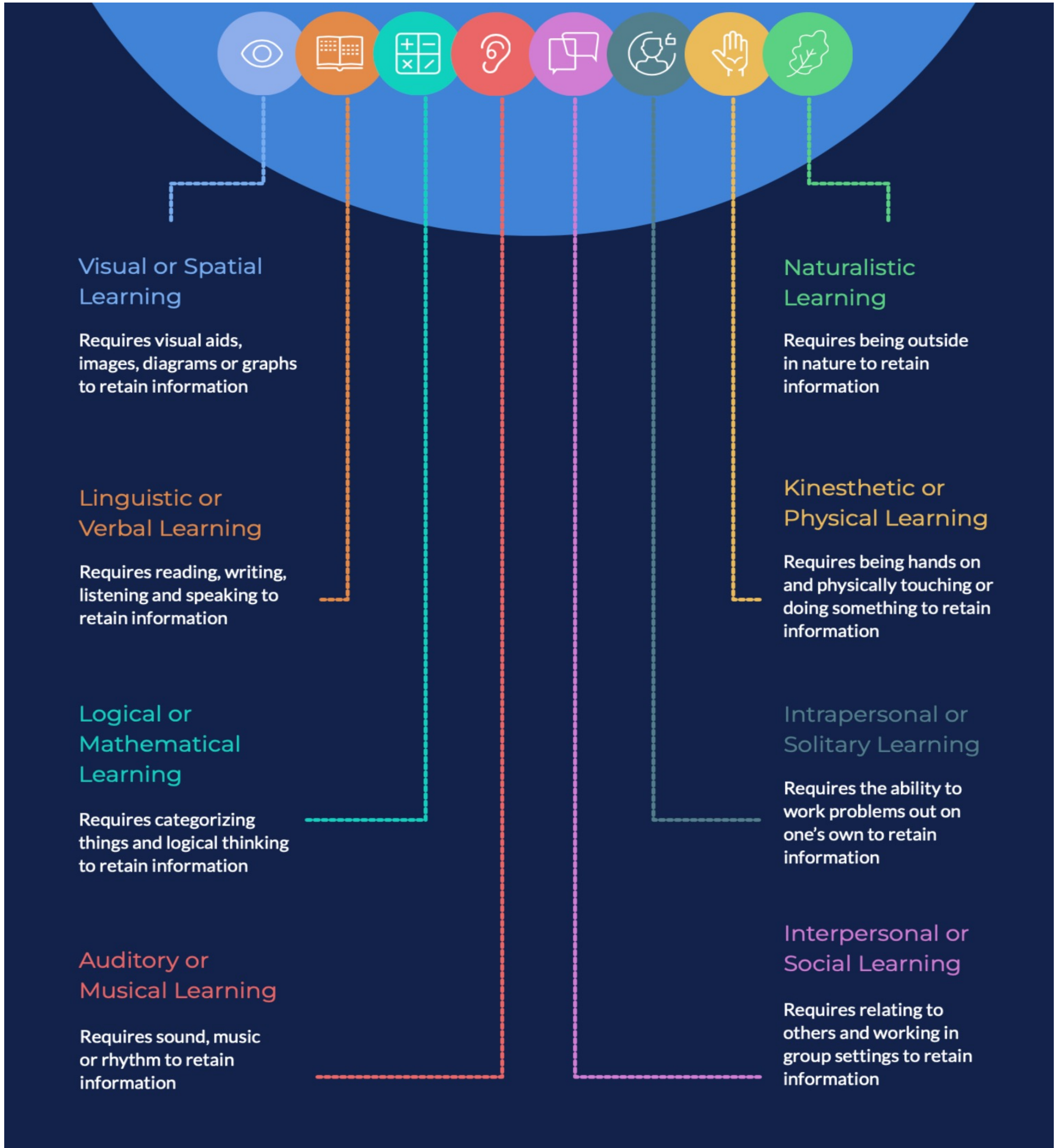
- Visual
- Linguistic
- Logical
- Auditory
- Naturalistic
- Kinesthetic
- Solitary or Social

Source: Visme



Visual or Spatial Learning

Requires visual aids, images, diagrams or graphs to retain information

Linguistic or Verbal Learning

Requires reading, writing, listening and speaking to retain information

Logical or Mathematical Learning

Requires categorizing things and logical thinking to retain information

Auditory or Musical Learning

Requires sound, music or rhythm to retain information

Naturalistic Learning

Requires being outside in nature to retain information

Kinesthetic or Physical Learning

Requires being hands on and physically touching or doing something to retain information

Intrapersonal or Solitary Learning

Requires the ability to work problems out on one's own to retain information

Interpersonal or Social Learning

Requires relating to others and working in group settings to retain information

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Visual

Chat

Are there any tips or tricks you use to help with meeting flow?

Linguistic

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Meeting Preparation Steps

Logical

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- Consider pre-work
- Coordinate content

Auditory

Naturalistic

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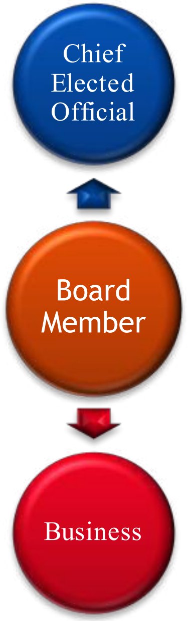
Which partner do you best represent?



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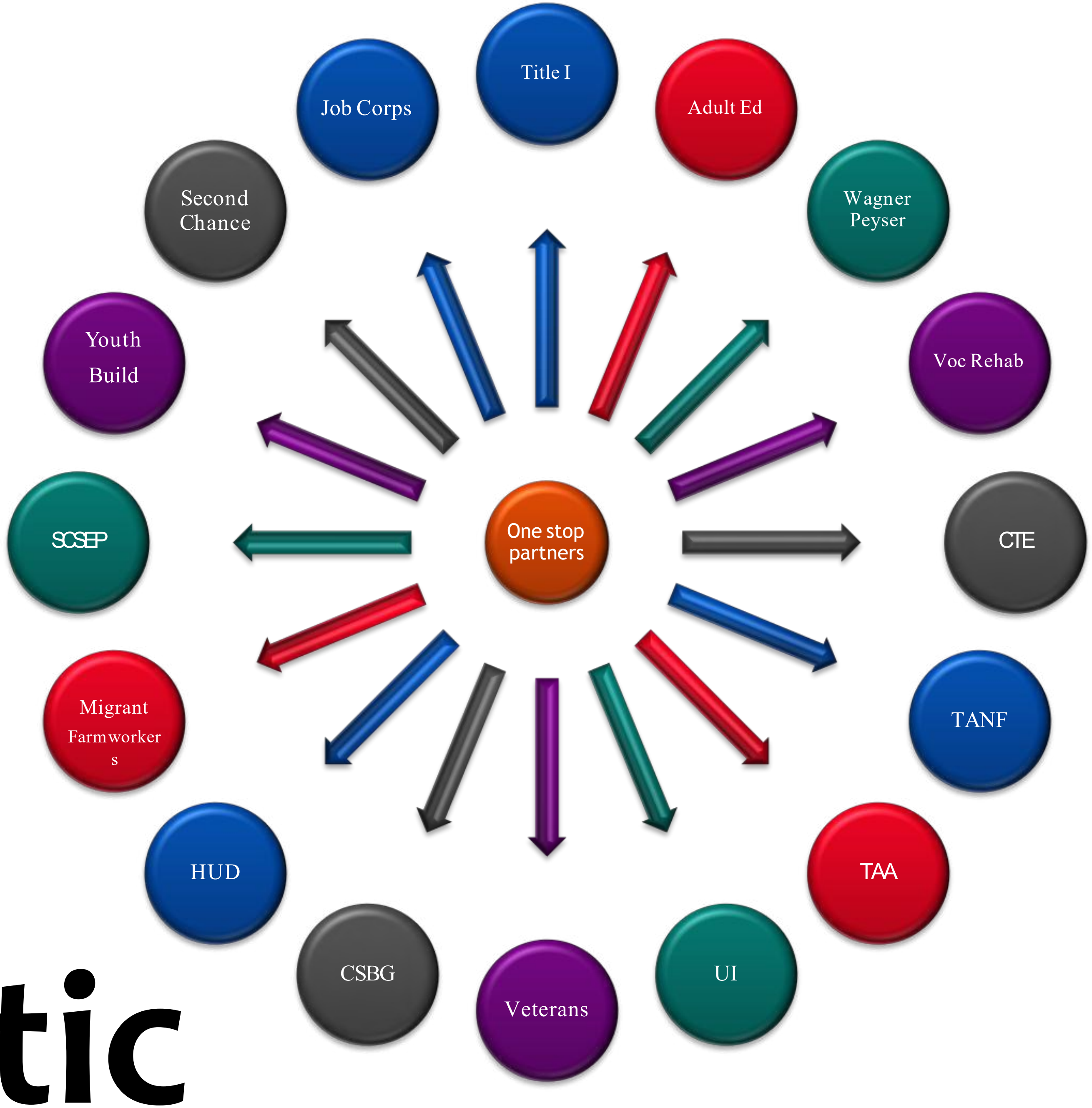

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TAA
UI
Veterans
CSBG
HUD
Migrant Farmworkers
SCSEP
Youth Build
Second Chance
Job Corps

Kinesthetic

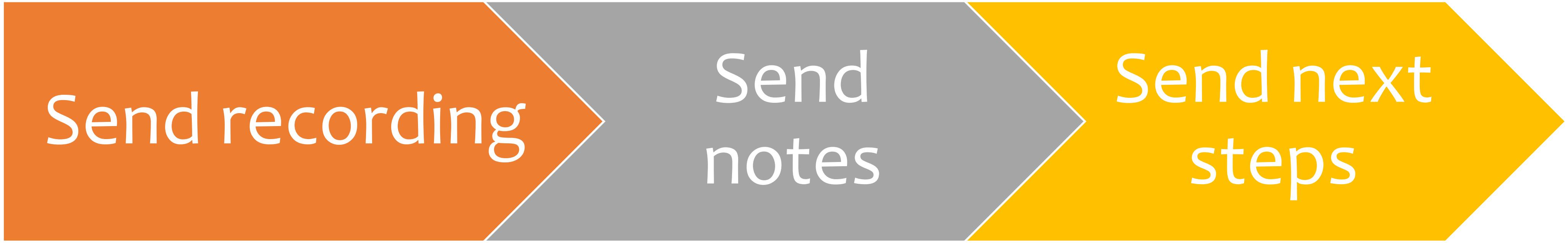
Solitary or Social

Poll

Which learning style do you think you relate most to?

- Visual
- Linguistic
- Logical
- Auditory
- Naturalistic
- Kinesthetic
- Solitary
- Social

Post Meeting



- Send recording
- Send notes
- Send next steps

“If my audience will only remember one thing about my explanation, what is that one thing? Why should my audience care about that one thing?”

Source: Inc, Matt Eventoff

Questions and Resources

- L.E.A.D. series recordings and presentations:
  - Optimizing Meeting Effectiveness
  - Taking Initiative and Being Accountable