PHASES OF A MEETING

The four typical phases of a meeting include:

1. Planning a meeting, which involves:
   • Agenda
   • Logistics
   • Contracting
   • Co-leading responsibilities
   • Room arrangements and set-up

2. Opening a meeting, which involves:
   • Review of agenda and desired outcomes
   • Setting an enthusiastic tone
   • Introductions and/or icebreakers
   • Ground rules
   • Safety/service tip
   • Establishing roles and responsibilities
   • Review of action items and communication plan from last meeting

3. Running a meeting, which involves:
   • Managing the discussion
   • Balancing participation: co-leads/team members
   • Keeping the process on track
• Appropriate use of team processes, including:
  » Creating visual group memory
  » Flipcharting
  » Brainstorming
  » Sticker ranking
  » Straw design

4. Closing a meeting, which involves:
  • Review agreements and action items
  • Agree on next steps and next meeting’s work
  • Develop communication plan
  • Meeting evaluation

**PLANNING A MEETING—CHECKLIST**

- Determine how and when co-leads will work together to plan meetings
- Reach agreement on each meeting’s purpose and desired outcomes
- Use the “Meeting Planning” worksheet to identify purpose and agenda items
- Use the “Meeting Logistics” worksheet to identify and confirm room, space and equipment needs
- Use the “Meeting Sanity Check” chart when creating the detailed agenda, to ensure agenda items and expected outcomes are reasonable within the meeting timeframe
- Notify team members of meeting time, location and expectations
- Consider and resolve scheduling conflicts so team members can participate
- Distribute copies of agenda and previous meeting’s notes in advance, so team members have time to review and come to the meeting prepared to address the planned agenda