**Planning and Running an Effective Meeting**

**WIOA Workforce Webinar  
January 17, 2024**

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| **Presentation** | **Notes** |
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| What have you experienced?   * Meeting that could/should have been an email * No agenda - no clear idea of purpose of the meeting * Participants not engaged in the meeting * Needed materials not available * Needed participants didn’t attend |  |
| You are not alone |  |
| **Your Guides to Planning to Eliminate Meeting Mishaps**  Dr. Margaret Segersten  Director of Adult Education  Regional Office of Education #33  [msegersten@roe33.net](mailto:msegersten@roe33.net)  Sarah Goldammer  Director  Southern Illinois Professional Development Center  [sgoldam@siue.edu](mailto:sgoldam@siue.edu) |  |
| Our goals (outcomes) for attendees today:   1. List essential components of an effective meeting 2. Identify research-based principles of effective meetings 3. Create an agenda and action plan for use in effective meetings 4. Laugh and have an “aha” moment |  |
| This hour will be worth your time if you:   * Please share what you want to achieve in the next precious hour of your time * This is your outcome (successful meetings have a designated outcome) |  |
| Agenda   * Meeting planning - need for a meeting, meeting types, purposes, and who should attend * Preparing and sharing the agenda * Stay on time * Make your meeting engaging * Importance of notes and action items * Laugh and nod your head * Play to your strengths * Time for questions - sharing of resources |  |
| Proper Prior Planning Prevents Poor Performance |  |
| Proper Prior Planning Promotes Peak Performance |  |
| Before you call the meeting:   * What do you want to accomplish? * Following the meeting, it will be a success if “xyz” are accomplished. * Is a meeting required or could we collaborate on a shared doc or give our opinions in a shared email? |  |
| What type of meeting are you having?   * Do you want a decision? * Do you want to generate ideas? * Are you getting status reports? * Are you communicating something? * Are you making plans?   <https://www.mindtools.com/afhhhdo/running-effective-meetings> |  |
| Who needs to attend and how long should it last?   * Give opinions or approval * Provide good ideas - inventors * Plant support * Time is precious - use it wisely * Beware of disrupters - both positive and negative |  |
| Planning and Sharing the Agenda   * Share the agenda in advance and supporting documents--with enough time for people to actually read them * Allow for input |  |
| What to Consider in Planning the Agenda   * Priorities – what absolutely must be covered? * Results – what do you need to accomplish at the meeting? * Participants – who needs to attend the meeting for it to be successful? * Sequence – in what order will you cover the topics? * Timing – how much time will spend on each topic? * Date and time – when will the meeting take place? * Place – where will the meeting take place? |  |
| Ask your attendees to be present   * Encourage participation by all * Assign tasks * Cameras on for virtual meetings |  |
| Stay on time   * Appoint a timekeeper (if needed) * Let people know you value their time * Take a break if needed * Don’t recap for late comers * Refer them to the shared notes being taken |  |
| Make your meeting engaging   * Assign parts of the meeting to others * Encourage feedback * Assign action items |  |
| Take notes   * Shared doc * Ask someone to help * Share these notes |  |
| Plan to laugh and gain consensus  Laughter:   * relieves stress and boredom, * boosts engagement and well-being, and * spurs creativity and collaboration as well as analytic precision and productivity. |  |
| Play to your strengths  Know yourself and know where you might need support - ask for it! |  |
| Tools for you to use   * Sample agendas * Research citations   <https://www.unomaha.edu/news/2018/11/seven-tips-for-meetings-research-shows.php>  <https://www.mindtools.com/afhhhdo/running-effective-meetings>  <https://ccaps.umn.edu/story/9-key-strategies-running-effective-meetings-project-manager>   * Notes from this presentation * Plan Agenda Template * Action Plan for Running an Effective Meeting |  |
| Questions? |  |