HOMETOWN FOOD SECURITY PROJECT

MOWER COUNTY, MN

Action Team Playbook

Updated June 2023

Table of Contents

Welcome!

"The journey of a thousand miles begins with one step" - Lao Tzu

The work you're doing matters! And we know that it will take time and a series of small changes to make an impact. Below are some words of inspiration from our Core team members on why they think this work matters.

> I think that engaging in this work will have a ripple effect in our community, because when we come we don't just show up as individuals- we also show up with our life experiences, and the individuals and systems that we influence. We can bring a voice to the table that may not show up otherwise. I think of the social work concept "use of self" which means to combine your knowledge, values, and skills gained... and I think each individual who takes part in this will bring that.
> - Gema Alvarado-Guerrero

> Your work to fight food insecurity is a significant issue because it directly relates to fulfilling one of the most fundamental human needs: access to an adequate and nutritious food supply. When individuals experience food insecurity, it can have wide-ranging consequences that extend beyond the simple sensation of hunger.
> - Jennie Crews

> In 1912, in his last public address at the age of 83, William Booth, Founder of The Salvation Army, remarked, "... while children go hungry as they do now I'll fight... I'll fight to the very end!" Three months later, Booth died. Will you join the fight today? Lets fight together and end childhood hunger in Austin and throughout Mower County.
> - Major Jeff Strickler

Getting Started

Bringing a Group Together

Bringing a group together for the first time is exciting! We've put together some considerations to help your group get started.

First, decide the format in which you'll meet. Live, Hybrid, or Remote? All choices have pro's and con's associated with them. Here are some considerations:

Hybrid/Remote
- What technology is needed to meet Hybrid or Remote that will ensure all participants have the best experience possible?
- Who is familiar with the technology and can be the point person to ensure it works correctly and participants have equal access?
- Do all participants have devices to connect to the meeting?
- Remote meeting resources
  - ZOOM
  - Microsoft Teams
  - Google Hangout
  - Webex
- Will you record the meeting for those not in attendance?

Live, In Person
- For a live meeting, where will you meet?
  - Public place examples: outdoors in a park, the Austin Public Library (room reservation required), Senior Center, etc.
  - Private option examples: member home, member workplace, The Coffee House on Main,
  - Be aware of requirements to meet in those locations such as reservations, cost (ex. rental fee, food/beverage purchase)
- Can a light snack or beverages be provided?
- Consider rotating locations and snack/beverage owners

Transportation
- How will people get to the meeting? Don't assume every person has equal access to transit modes like personal vehicles or bicycles.
- Resources: Rapid Transit Dial-a-Ride, AB Taxi, carpooling

Interpretation Services
- Do participants all speak the same language? Are also participants hearing? If not, consider enlisting a translator or interpreter that may be a group member or outside contact
- Resources: Welcome Center

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Getting Started cont.

<u>When to Meet</u>
- Decide on a time and day to meet.
- Consider both day and evening times to accommodate participants working different shifts.
- Resources: Use an options poll like Doodle (free) if participants all have digital access.

When You're Ready with the Details

When you're ready with the who/what/where/when/why/how,
- Send out an email with the logistical details including who to contact with questions and how to contact them
- Share helpful links to resources include the Mower County Hometown Food Security website and Community Assessment report. Ask them to review the most important pages relevant to your project/inititative
- Send out a calendar invite with the same details
- The day before the meeting, send out a reminder email that includes the meeting agenda

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File Storage Recommendation

- A Google drive structure will be made available so teams can create, store, and share documents with each other

Bringing Agility to the Work

Catapult Overview

Catapult is the name for the Agile practice at Hormel Foods. According to the Business Agility Institute, Agile is a mindset — it's a way of thinking — that's defined by four values, described by twelve principles, and then manifested through an unlimited number of practices or different ways of working [Ahmed Sidky]

Within the Mower County Hometown Food Security project coalition, we've focused on the 4 values which have been adapted from the Agile Manifesto:

CATAPULT VALUES

"We are uncovering better ways of developing products and services by doing it and helping others do it. Through this work we have come to value:

Individuals and Interactions	over	Process and Tools
Working Prototype	over	Perfection
Customer* Collaboration	over	Internal Focus
Responding to Change	over	Following a Plan

"...while there is value in the things on the right, we value the things on the left more"

* Customer = retailer/operator/shopper/consumer etc.

These values show up in how we work together which includes how we make decisions, organize work, support each other, etc.

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Good Meeting Practices - 1 pager

Components of Good Meetings

Below are some general good practices when it comes to meetings, shown on a single page. An effective meeting brings a thoughtfully selected group of people together for a specific purpose, provides a forum for open discussion, and delivers a tangible result: a decision, a plan, a list of great ideas to pursue, a shared understanding of the work ahead.

Components of Good Meetings

Purpose

Ask: How can we take care of this without a meeting?

Focus

Remember, Meetings exist to serve you and your workplace, not the other way around

Closing the meeting:
- Summarize commitments (who/what/when)
- Confirm time & location of next meeting
- Don't wait until the next meeting to update the meeting leader or group that the commitment has been completed

Time

Time is like money, think of it like a budget

- Meeting leader needs to ensure team stays within the time budget
- Sticking to the time budget helps everyone be heard, shows respect for everyone's time, and keeps meetings running smoothly
- Homework – spend more time in the meeting discussing. Set expectation to review ahead of time. May require separate email
- End on time or early!

Agenda

Taking notes is an effective tool to ensure everyone is on the same page during & after the meeting

- Rotate responsibility of being the note taker
- Focus on action notes instead of every word someone says
- Especially note the commitments people make in the meeting (remind everyone of these at the end of the meeting)
- Send the notes to everyone included in the meeting
- End result is to help people follow through on their commitments and strengthen communication between people

Preparation

- Do you have all the information needed for the meeting?
- Do we need to discuss & collaborate or are we going to delegate & calendar?
- Is it critical that we're all on the same page?
- Would this meeting directly serve each attendee's most valuable activities (the activities that you perform that bring the most impact to the bottom line of the business)?

First Meeting Template

Agenda

Objective: get started well

Agenda
1. Introductions
2. Presencing practice
3. Form a Team Agreement
4. Decide on future meeting cadence (day/time)
5. Close - state the next steps including action items
6. Check Out

Supporting Content

Since this is your first time meeting, before participants gather, identify who will lead the discussion and identify who will send the follow up's out. Start by stating the objective and agenda topics for today.

Introductions
- Go around the room and invite people to say their name and why they're here IN ONE BREATH. The one breath is important to maintain brevity. Repeat the instructions if needed especially as you get started. If someone steps out of the framework, gently remind before the next person that this is the "rule" for today. Be careful not to make the person who went longer feel bad.
- They should choose the next person to go. Call it "who would you invite next?" or "who are you curious about?"
- If the group is really big, and the time doesn't allow everyone to share, it can be quite nice to ask them questions using stand up/sit down or hands up to respond. Examples:
  - who works in healthcare/education/childcare/business?
  - who's lived here a long/short time?
  - who has/not worked in a group like this before?
  - who's excited to get started?

Presencing Practice
- Presencing is the the act of bringing yourself into the present moment. A simple way to use this as you gather together is to breathe.
  - Take 3 deep breaths in and out together
  - Perfect Breath: Inhale and exhale through your nose for a count of 5 or 6. Do this for 2-3 minutes
  - Box Breathing: Inhale to the count of 5, hold your breath at the top for a count of 5, exhale for a count of 5, hold your breath out for a count of 5. Repeat for 2-3 minutes.

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First Meeting Template cont.

Form a Team Agreement*
Purpose: Psychologically safe teams are able to communicate freely, challenge the status quo, think big and take risks, and work through difficult situations in a productive and respectful way. Identifying your expectations of each other and how you will work together is a great way to start a team well. This agreement can also be referenced during times of conflict.

Focus on the areas of Communication, Collaboration, and Information sharing in this exercise.

Instructions
Discussion
  1. Ask the group: 'What is going to help us work well together?' and capture only keywords on a flip chart/digitally. (2-3 minutes)
  2. Reinforce their contributions and remind them that our goal is to come up with a group contract of 6-10 agreements, through consensus.
  3. Go deeper into the discussion by asking key questions around their keywords.   For example, ask: 'Creativity requires us to take risks - how do we share big ideas? How do we show others that their ideas are valued?
  4. Use clarifying questions and prompt the group to articulate the observable behavior(s) that will show they are living up to that agreement.
  5. Ask for consensus before writing the agreement on a blank flip chart/slide/digital space. Repeat this until you have considered all topics and your list of agreements is complete.   Questions could include:
      ◦ How does diversity show up in this group? How do we view and approach diversity effectively and respectfully?
      ◦ What does full participation look like? What can we do to encourage others to participate?
      ◦ What does effective communication look like?

Commitment (2-5 minutes): After completing the list, invite each person in the group (including you!) to 'sign the contract' to symbolize their commitment to these agreements.

* Adapted from: https://www.sessionlab.com/methods/group-contract-for-trust-creativity-high-performance (PDF instructions)

Future Meeting Date/Time
Identify a series of meetings that would work for the next 30 days. Aim to meet 1x/week. Don't forget the considerations identified on p. 3.

Close
State the next steps including action items. Be sure the action items have been agreed to and not assigned. State the day/time and location of the next meeting.

Check Out
Ask for volunteers to share 1 word on how they're feeling leaving today. Pay attention to cues that indicate the energy level of the group.

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Second Meeting Template

Agenda

Objective: build the implementation plan

Agenda
1. Welcome new members
2. Presencing practice
3. Revisit the Team Agreement
4. Build the Implementation Plan
5. Close - state the next steps including action items
6. Check Out

Supporting Content

Before you get started, make sure you've identified who will lead the discussion and who will send the follow up's out. Start by stating the objective and agenda topics for today.

Introductions
- Ask if this is anyone's first meeting and have them raise their hand
- Invite the new participants to say their name and why they're here IN ONE BREATH. The one breath is important to maintain brevity.
- To help the new participants feel more comfortable, introduce yourself first, modeling the format

Presencing Practice
- Presencing is the the act of bringing yourself into the present moment. A simple way to use this as you gather together is to breathe.
  - take 3 deep breaths in and out together
  - Perfect Breath: Inhale and exhale through your nose for a count of 5 or 6. Do this for 2-3 minutes
  - Box Breathing: Inhale to the count of 5, hold your breath at the top for a count of 5, exhale for a count of 5, hold your breath out for a count of 5. Repeat for 2-3 minutes.
- Other ideas welcomed like a visualization or mindfulness exercise.

Revisit the Team Agreement
Remind the group what they accomplished last meeting. Share a copy of the Agreement with new participants. Like any guideline, Team Agreements are like a muscle that need to be flexed. Reiterate the agreements often and keep this documentation open and top-of-mind during all major decisions or any moments of conflict. Consider having new members sign too.

14 Encourage teammates to review the Agreement a few times a year.

Second Meeting Template cont.

Build the Implementation Plan
- See a completed sample on p. 17. A blank copy is on p. 18.
- Regardless of team size, state the goal of this activity which is to populate as much of the Implementation Plan as possible. This is the group's guiding document for their project. Ask for a show of hands if they are willing to disagree and commit meaning even though a decision may not be what I wanted, I'm willing to disagree yet commit to supporting it. If we uncover an idea that needs consensus, we'll state that before voting.
- The facilitator of the discussion should ensure that all voices are being heard, not just the loudest ones. Invite quiet participants into the dialogue. For example, "Molly, what do you think about the idea of increasing by 10%?"
- Use metrics as much as possible, especially in question #1. Look to the Community Assessment Report for assistance. If you lack baseline metrics, consider how to obtain them in your 30-60-90 day plan notes.
- All of the questions in the Plan need to be populated
- Today is about the roadmap, you'll get into the specific tasks in meeting #3
- If you don't complete the Implementation Plan today, repeat the agenda meeting #4

Tips
- Ask each question and allow participants to answer silently using a Sharpie, sticky note, and 1 idea/sticky - 4 min
- Ask for volunteer to group the sticky notes looking for themes - 1 min
- Vote with sticky dots or checkmarks where needed
- Don't strive for consensus, especially in larger groups

Close
State the next steps including action items. Be sure the action items have been agreed to and not assigned. State the day/time and location of the next meeting.

Check Out
- Ask for volunteers to share 1 word on how they're feeling leaving today. Pay attention to cues that indicate the energy level of the group.
- Other Options
  - Glows and grows - things that the participants appreciated and where we can improve
  - Say what you need to feel complete from today in one breath
  - 1 thing I learned today is...

15

Notes Page

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Sample Implementation Plan

Implementation Plan

Name of Goal: Education & empowerment. Improve access to information and locations like what is available, to whom, and when.

Name of Project / Initiative: Increase access to existing resources

1. One Year Goals: Looking ahead, what 2-3 measurable goals (outcomes/results) would reflect meaningful progress towards the success of this Goal, and towards the success of the Hometown Food Security Project?

- Event usage increases 10%: Food distribution events are coordinated to prevent overlap and expand calendar coverage
- Sr. usage increases 20%: Sr. distribution events offer home delivery options and smaller packaging options

2. Six Month Benchmarks: What key benchmarks, ~ 6 months from now, might tell your group that you're on track to achieve your most important 2-3 goals that you articulated in question 1?

- At least 2 events have been coordinated
- The Sr. distribution event has a home delivery option
- We're tested 3 different carrying methods for Sr. distribution pickup
- Our group size has at least 8 members

3. Short Term Action Steps: What 5-7 actions do you suggest taking in the next 30-60-90 days, to make the smallest, yet most important progress toward the benchmarks identified in question 2?

- Build a discussion guide on the background of HFS and how this project fits into the work so that we have the same message with each group we meet with
- Contact at least 6 distribution leaders to initiate collaboration
- Solicit 5 additional team members for our group
- Add transportation volunteer opportunities to the Get Connected site
- Etc.
- Etc.

4. Funding. Do you anticipate needing funding or in-kind resources to achieve your One Year Goal? If so, what might that look like? What might be needed?

- We'd like to provide Sr. distribution event volunteers with $10 gas cards to encourage sign up's. We anticipate 5 volunteers per event x 4 events/year = $200

5. Critical Stakeholders: Who are the critical stakeholders (by function or by name) that will be important to the success of your efforts?

- CLUES leadership
- Channel 1 Foodbank
- Etc.
- Etc.

6. Co-Champions: Who (at least 2) would be willing to raise their hand, to champion this initiative moving forward? Xxxxxx, yyyyyy

17

Implementation Plan Template

Name of Goal: _____

Name of Project/Initiative: _____

1. One Year Goals: Looking ahead, what 2-3 measurable goals (outcomes/results) from your project/initiative would reflect meaningful progress towards the success of this Goal, and towards the success of the Hometown Food Security Project?

2. Six Month Benchmarks: What key benchmarks, ~ 6 months from now, might tell your group that you're on track to achieve your most important 2-3 goals that you articulated in question 1?

3. Short Term Action Steps: What 5-7 actions do you suggest taking in the next 30-60-90 days, to make the smallest, yet most important progress toward the benchmarks identified in question 2?

4. Funding. Do you anticipate needing funding or in-kind resources to achieve your One Year Goal? If so, what might that look like? What might be needed?

5. Critical Stakeholders: Who are the critical stakeholders (by function or by name) that will be important to the success of your efforts? Stakeholders could be members in and outside of the community, members of the group you're working to serve, etc.

6. Co-Champions: Who (at least 2) would be willing to raise their hand, to champion this initiative moving forward?

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Third Meeting Template

Agenda

Objective: take action

Agenda
1. Welcome new members
2. Presencing practice
3. Revisit the Team Agreement
4. Develop the 30-60-90 day specific action steps
   a. may include steps to develop the measurable goals if they aren't readily available
5. Close - state the next steps including action items
6. Check Out

Supporting Content

Before you get started, make sure you've identified who will lead the discussion and who will send the follow up's out. Start by stating the objective and agenda topics for today.

Introductions
- Ask if this is anyone's first meeting and have them raise their hand
- Invite the new participants to say their name and why they're here IN ONE BREATH. The one breath is important to maintain brevity.
- To help the new participants feel more comfortable, introduce yourself first, modeling the format

Presencing Practice
- Presencing is the the act of bringing yourself into the present moment. A simple way to use this as you gather together is to breathe.
  - take 3 deep breaths in and out together
  - Perfect Breath: Inhale and exhale through your nose for a count of 5 or 6. Do this for 2-3 minutes
  - Box Breathing: Inhale to the count of 5, hold your breath at the top for a count of 5, exhale for a count of 5, hold your breath out for a count of 5. Repeat for 2-3 minutes.
- Other ideas welcomed like a visualization or mindfulness exercise.

Third Meeting Template cont.

<u>30-60-90 Day Action Steps</u>
This is where the rubber meets the road! The Action Steps will help the team visualize what needs to happen and when in order to meet the goals of their Action Plan. Use the same techniques offered in the Implementation Plan development to identify tasks within each timeframe.

Details on obtaining identified funding needs will be shared at a later date.

All tasks need to have an owner. Monitor that the workload is being shared amongst the team.

<u>Close</u>
State the next steps including action items. Be sure the action items have been agreed to and not assigned. State the day/time and location of the next meeting.

<u>Check Out</u>
- Ask for volunteers to share 1 word on how they're feeling leaving today. Pay attention to cues that indicate the energy level of the group.
- Other Options
    - Glows and grows - things that the participants appreciated and where we can improve
    - Say what you need to feel complete from today in one breath
    - 1 thing I learned today is..

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Unifying & Connecting

How to connect to the Core Team

The Core team member(s) are the conveners of the Action Team and will be the link back to the Core team.

After a meeting, change within your Action Team, etc., the Core team member should share your agenda/notes in the Implementation channel in Microsoft Teams.

The Core team will continue to focus on:
- Action Team success enablement
- Developing a funding model
- Tracking KPI's identified in the Strategic Plan
- Identifying formal training needs on topics like cultural sensitivity

Reference

A list of places to go when you have questions or need more information

Our website: https://hometownfoodsecurity.org/
- Community Assessment Report
- Strategic Plan

Other Links
- High level stats - key indicators of opportunity, need
  - Mower County food insecurity rates
    - Map the Meal Gap - https://map.feedingamerica.org/
  - Mower County poverty rates and health rankings
    - County Health Rankings - https://www.countyhealthrankings.org/
- Demographics - who is impacted by food insecurity and why communities should care
  - FI impacts everyone and can be hard to recognize
    - I am Hunger in America - https://www.feedingamerica.org/i-am-hunger/
- Project history - "5 Steps to Building a Hunger Free Community Coalition"
  - Don't reinvent the wheel! We're using a blueprint:
    - BCHP - https://www.baylor.edu/hungerandpoverty/
    - Toolkit - https://www.baylor.edu/hungerdatalab/doc.php/350176.pdf
- Opportunities and call to action
  - Stay up to date on our project: HFSP Website: https://hometownfoodsecurity.org/
  - Read the toolkit for ideas and resources
  - Explore other coalitions for examples and inspiration
    - Texas Hunger Network - https://texashungernetwork.org/network-coalitions
    - Dallas Coalition - https://www.facebook.com/DallasHungerSolutions
    - San Diego Coalition - https://www.sandiegohungercoalition.org/
  - Get involved in your community
- https://www.wholewhale.com/

Select Pages from the Toolkit

The Baylor Collaborative on Hunger and Poverty created a helpful toolkit that has been leveraged by our project. The following are select pages from that toolkit that are most relevant for launching Action Teams.
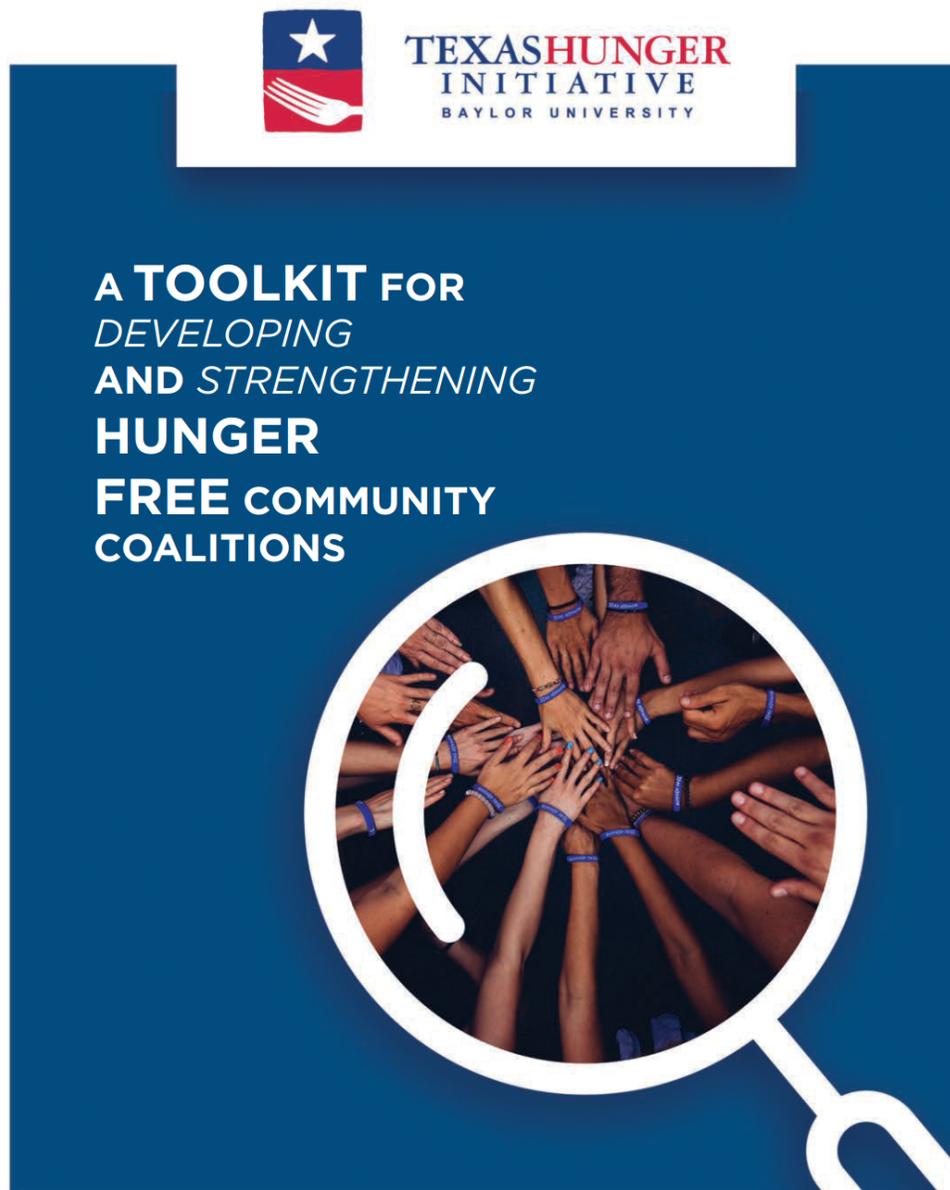
COALITION BEST PRACTICES

Be action and results-oriented

▷ Make sure that the intent of the coalition is to implement action items with concrete results that can be quantified

Multi-sector organizational involvement

▷ Ensure that there are multiple organizations involved and that they feel ownership of the coalition and its work

▷ Ensure that organizations involved are from diverse sectors in order to provide diversity of resources, expertise and whole community ownership

Establish a clear coalition structure that promotes multiple leadership roles, dispersed responsibility and mutual accountability

▷ Ensure that leadership is comprised of multiple people and organizations that have significant responsibilities and long-term tasks to implement coalition goals

▷ Make sure there are mechanisms for mutual accountability, such as regular progress reporting from those who have taken on tasks or responsibility

Include people with lived experience of food insecurity as participants and leaders

▷ Encourage opportunities to engage people in leadership roles in the coalition who have experience being food insecure

▷ Make sure to engage people who may be experiencing food insecurity as part of any community assessments

Use an open, consensus-based approach to group decision-making

▷ Determine if there is a set process for decision-making. If not, observe whether the de facto culture is to have an open, consensus-based approach to group decision-making

▷ Ensure that one or two people are not overly dominating decision-making or that some members are not consistently having their voices shut down

Implement an asset-based approach to community assessment and issue development

▷ Ensure that the coalition's community assessment does not only look at needs of the community but also resources and assets that already exist

▷ Make sure that issue development focuses on how to better utilize or build off of existing resources and assets in the community

Assist in ensuring that the identification of action issues involves engaging community leaders/members in determining what issues are of most interest and whether there is potential leadership around those issues

Utilize a multi-pronged approach to tackling food insecurity and healthy food access

▷ Encourage the coalition to take on more than one issue at a time in order to diversify focus to better address food insecurity

▷ This approach also increases the chances that diverse organizations and individuals will be involved

▷ Working on more than one issue at a time keeps the focus on food insecurity general rather than on one specific activity, which promotes long-term coalition sustainability beyond the life of any particular activity

Regular self-evaluation for improvement

▷ Promote the importance of the coalition regularly by engaging in self-evaluation of progress

Long-term sustainability through staff support and financial resources

▷ Ensure that the coalition has plans to develop backbone support and/or the financial resources necessary for sustainability

35

EXAMPLE *ACTIVITY PRIORITIZATION* MODEL

There are many ways to prioritize activities to take on and processes for getting there. Below is an example of one approach. If you have an action team model, this could be implemented by an action team to identify activities within their issue area, or it could be implemented coalition-wide.

1. Develop a list of potential activities that the coalition could take on

≫ Before doing this, review a community assessment or issue-specific assessment to make sure everyone is on the same page about the problems, assets, resources barriers and gaps

≫ A couple different strategies to consider depending on the size of the group:
    i.   Group brainstorm, popcorn-style (where anyone can share an idea as it comes to them)
    ii.   Break up into small groups and brainstorm in small groups before having each group report back to the larger group

2. For each activity idea mentioned, discuss the following questions:

≫ How much of an impact would this activity have on helping the community? What would the metrics of impact be?

≫ Is this an activity that would benefit from a collaborative approach by multiple organizations or individuals or could one organization or individual do it by themselves?

≫ What is the likelihood of successful implementation? Do we currently have the resources among the group to implement or would it require bringing in new resources?

≫ How long will it take to implement this activity successfully?

≫ Will this activity help the coalition engage new members and build support for the coalition?

3. Give each person in the group three stickers and instruct them to place them by the activities they think the coalition should take on and that they would be interested in working on

≫ Small colored dot stickers work well for this purpose

≫ People can put more than one sticker on an activity if they are especially interested in working on that activity

4. Starting with the activity that has the most dots, ask people to raise their hands if they are interested in working on the activity; then ask who would be willing to initially take the lead on pulling folks together to discuss further

> If no one is willing to take the lead, put the activity on hold and move on to the next one and revisit later – you do not want to pick an activity if there is no leadership behind it

> Stop once you have gotten to activities that do not have a sufficient number of people interested in working on it or that no one is interested in taking the lead on

> Depending on the size of the group (especially if it is an action team) you may want to just choose the one or two activities that get the highest number of dots and have one or more people willing to take the lead

5. Ask each activity group to meet with instructions to develop a logic model for their activity that includes steps to implement, who will take on which tasks and overall success metrics

> Encourage the groups to make sure as they develop their logic model that the activity still seems feasible – if it is not, then it is ok to not pursue it or to shift to a different activity that might work better

> Once a plan is developed, formalize the activity group into a work group or action team to implement the activity, with designated chair or co-chairs to lead

ACTIVITY
LOGIC
MODEL

ASSUMPTIONS :

LONG-TERM OUTCOMES :

GENERAL INPUTS :

Strategy	**Activities**	**Assignment**	**Timeframe**	**Output Metrics**	**Mid-Term Outcomes**
What do we do?	*How will we do it?*	*Who will be responsible?*	*When will we implement?*	*How can we track the success of our work?*	*How will we know we are moving toward our long-term outcomes?*

60

29

STEPS FOR *EFFECTIVE* MEETINGS

Start by asking: Is this meeting necessary?

> Why are you having the meeting?

> What is the goal?
> - General goals for meetings:
>   > To make decisions
>   > To brainstorm ideas about where the group should go
>   > To celebrate a success and build morale
>   > To provide opportunities for training or learning
> - Know the specific goal or goals for each meeting before setting the agenda
>   > Where do you want your organization to be at the end of the meeting that is different from where it was before the meeting?

Set meeting time

> Have a clear start and ending time, and stick to it

> Set the meeting as far in advance as possible so that attendees can plan accordingly

> If it is a group that meets often, it is best to set a regular meeting time and location

Meet in a comfortable environment

> Make sure there are no distractions or loud noise

> Arrange seating so that everyone can see each other (Make sure there are not too many empty seats – that can depress the energy of the group)

> Consider providing refreshments, at minimum have water available

Getting people there

> Ask people to RSVP to the meeting (knowing who will be there will make it easier to prepare for the meeting)

> Send the group a reminder a couple days before the meeting and the day of the meeting

> Provide directions to the meeting place so that attendees can easily find the meeting once they arrive

Setting the agenda

> Have the agenda set in advance and make sure the agenda achieves the goals you have for the meeting

> In setting the agenda, if the group is large (over 25) consider small group discussion as part of the agenda (small groups discuss then present back to the large group)

> Make sure the agenda is achievable in the time allotted for the meeting (it is helpful to have your own version of the agenda that has times associated with each item on the agenda and then also use that version to keep the meeting on schedule)

> If it is a group that meets regularly, send group members the agenda before the meeting (at least a day before) so they can prepare

> If you are asking people to do something at a meeting, make sure to ask them if they are willing to do it in advance (and before sending out the agenda if it has their name on it)

Preparing for the meeting

> If there is an important decision to be made, it is often helpful to talk to people about the question in advance so that you know what they are thinking and what their concerns are, and also so they start thinking about it before the meeting – doing this will help you facilitate the discussion and move the group to a decision more easily

> Arrive early so you can do any required set up and so someone is there when the first person arrives

> Provide a sign-in sheet to track attendee contact information

> Consider providing visuals (people like visuals, but make sure they support the agenda and don't distract from moving through the agenda on schedule)

Meeting facilitation prep

> Designate one meeting facilitator and ensure that person is prepared for the meeting

> Ask an attendee to take minutes or notes so that there is a record of the discussion and any decisions made at the meeting (it is hard for the person facilitating to also take minutes as it distracts them from keeping the meeting on track) For a large group, prepare some proposed ground rules for any discussion so that the meeting can

stay on track – this is particularly important for a group that meets regularly (for large groups that are making decisions, one of those ground rules should also be how decisions are made)

Starting a Meeting

> Start by introducing yourself, welcoming everyone, and if there are new people who have not previously attended the group meetings make sure to introduce the group and what it's about

> Ask everyone to introduce themselves (this is important, but do not do this if the group is very large – more than 30 or 40) – if they represent organizations, make sure they share what organization they are with (it's often helpful to have name tents/tags)

> Discuss any proposed ground rules and get agreement from the group

> Review the agenda and the goals of the meeting as a group, and make clear the ending time of the meeting

Meeting facilitation

> Keep people on track with the agenda and help the group achieve the meeting goal(s)

> Bring the conversation back on topic if it strays

> Move the conversation on to next agenda item once the previous item is concluded

Making a decision

> Facilitating discussion towards a decision should include:

    o Clearly present the proposal(s)

    o Check for understanding that people are clear about what the proposal(s) are

    o Check for agreement to confirm that a decision has been made and everyone is on the same page

Facilitation tips

▷ Consider using an easel pad (or something similar) to track the group discussion

▷ If the group is brainstorming, make sure people can share ideas without those ideas getting dissected (it is helpful to set the ground rule of sharing without critiques before beginning the brainstorm)

▷ Do not interrupt or dominate a conversation and work to keep others from doing so as well (this is also a good ground rule to set)

▷ Offer everyone a chance to speak on each agenda item

▷ If there are tasks to be accomplished before the next meeting, make sure it is clear what the tasks are, who has agreed to do them, and when they are supposed to be completed

▷ Remain positive towards people even if they are making things difficult (if they are making things difficult in an unconstructive way, talk to them privately after the meeting)

SOME POSSIBLE GROUND RULES TO CONSIDER:

▷ Follow the approved agenda

▷ Start and end on time

▷ No sidebar conversations

▷ Make sure everyone has a chance to share

▷ Be open to hearing other people's perspectives

▷ Do not interrupt others while they are speaking

▷ Focus on solutions rather than problems

▷ Make sure there is agreement on next steps before the end of the meeting

Ending meetings

▷ Review what was decided and accomplished

▷ Set the time and place for the next meeting

▷ If possible, set the goal or general agenda items that the group wants to cover at the next meeting

▷ Close the meeting on a positive, uplifting note – including thanking people for coming

▷ End the meeting on time

After the meeting

▷ Collect and review meeting minutes/notes

▷ If decisions were made or tasks were determined and delegated, send out a follow-up e-mail thanking everyone for attending and relaying the decisions and/or tasks with who agreed to do them and by when (important for accountability and making sure everyone is on the same page – it is also helpful for filling in folks who missed the meeting)

▷ Keep track of who attended the meeting