Meeting Planning Tool

Setting or Socializing Your Aim, Goals, Drivers, and Milestones, Fall 2023

---

1. Clarify the Purpose of Your Meeting

What content from the learning session was your team not able to finish, or does your team need to socialize with your broader team?

Set Your Objectives

- *If we leave this time with _____ it will feel like we have made progress*
- *This meeting will be a success IF _____*

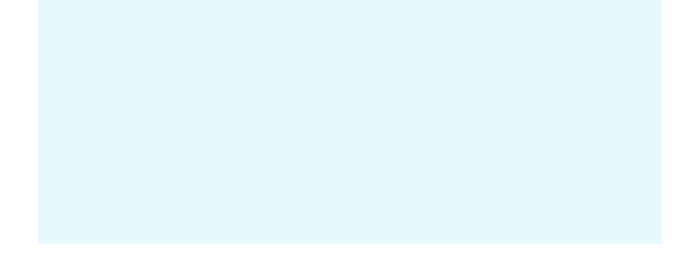Can all your objectives be accomplished in one meeting or do you need more than one?

2. Coordinate Your Guestlist

Must Attend	Role/Goal

Not This Meeting	Roal/Goal

3. Consider Context

What framing or information is needed to have a conversation everyone can participate in?

- Is everyone on the guestlist familiar with Built for Zero? Are they familiar with why and how we set Aims/Goals/Drivers/Milestones?
- Were there conversations or decisions made by the team at the Learning Session that the rest of the team needs to be aware of?

4. Create Your Space

For an in-person event

This is a suggested list of items to consider as you plan the logistics of this in-person event. Your team is responsible for all on-site logistics, but please let the BfZ team know how we can support you during this planning process.

4-6 weeks prior:
- ☐ Determine Date + Time of event
    - ☐ Have you considered all major religious, state, and federal holidays?
- ☐ Secure meeting location
    - ☐ Considered Accessibility Needs ? Wheelchair accessibility, etc
- ☐ Send out invite calendar holds for participants to have the time marked in calendar
- ☐ Consider Incentives for participation: (gift cards, raffle items?)
- ☐ Consider where we can bring in people with lived experience into the work
- ☐ Consider how you will track attendance / RSVPs. We recommend an RSVP service through a site like Paperless Post or Eventbrite to ensure you can track accessibility and dietary needs.

2 weeks prior:
- ☐ Order Supplies Needed:
    - ☐ Large/ giant post-it chart paper
    - ☐ Post-its varied colors
    - ☐ Markers
    - ☐ Pens
    - ☐ Round colored stickers
- ☐ Consider Hospitality:
    - ☐ Water
    - ☐ Coffee
    - ☐ Snacks
    - ☐ Air Quality Control
    - ☐ Fidgets at tables
    - ☐ Pens
    - ☐ Paper
    - ☐ Lunch (consider dietary restrictions)
    - ☐ Accessibility Needs: Print outs or ESL translators for participants if needed.
    - ☐ COVID Protocol: Masks, Hand Sanitizer, Outdoor options for lunch?

Week of:
- ☐ Send out email reminder
    - ☐ One Week out
    - ☐ Day Before
        - ☐ Consider reminders like bringing a reusable water bottle, remind

Built For Zero.
COMMUNITY SOLUTIONS

people of food accommodations, and share COVID protocol + safety measures taken, and parking / travel suggestions.

- ☐ Set up & test Hybrid media tech
  - ☐ Zoom link set up
  - ☐ Test Sound
  - ☐ Display people in zoom room/content being shared
- ☐ Print External Agendas
- ☐ Ensure any volunteer roles are assigned & coordinated (Who is picking up lunch? Who is Setting up the space?)

Day of:

- ☐ Arrive at least an hour early to ensure that the space is set up and to troubleshoot hybrid meeting options or any other tech.
- ☐ Create a parking lot (designated area in the room for questions or thoughts not pertaining to content can be held/posted)

For a virtual event

1-2 weeks prior

- ☐ Technology and equipment:
  - ☐ Identify your meeting tools and tech.
  - ☐ Learn how these tools work, including all capabilities.
  - ☐ Share basic tool instructions with attendees.
  - ☐ Choose a neutral/professional setting where you can host the meeting.
  - ☐ Test your meeting tool on your computer.
- ☐ Engagement:
  - ☐ Send Meeting Invitations (include):
    - ☐ Meeting date and time
    - ☐ Technological format
    - ☐ Connection links and instructions
    - ☐ Attendee expectations
    - ☐ Meeting itinerary
    - ☐ Meeting objectives
  - ☐ Pick a short icebreaker question for the beginning of the meeting.
  - ☐ Develop a short itinerary and an objective summary to send along with your meeting invitation.
  - ☐ Set attendee expectations.
- ☐ Troubleshooting:
  - ☐ Find a moderator to help with IT issues.
  - ☐ FInd a co-host to help with engagement.
  - ☐ Commit to an "identify and eliminate" problem-solving strategy for unforeseen challenges.

Week of:
- [ ] Send out email reminder
  - [ ] One week out
  - [ ] Day of
    - [ ] Think about including: a request for everyone to test the meeting technology if it is unfamiliar to them and the details outlined in the original meeting invitation
  - [ ] Prepare and test interactive elements (i.e. mural or jamboard)

Day of:
- [ ] Conduct pre-meeting checks
  - [ ] Sign into your meeting with your fellow hosts/moderators
  - [ ] Check your microphone and speakers
  - [ ] Verify your meeting settings, including any attendee settings (muting/camera off) you want to have in place.
  - [ ] Launch a waiting room if your technology allows.
  - [ ] Review your meeting flow and itinerary one last time.
- [ ] Kick off your meeting in style
  - [ ] Do a roll call to give everyone a chance to smile and greet one another.
  - [ ] Deliver the icebreaker you selected prior
- [ ] Meeting Facilitation
  - [ ] Stick to your meeting flow and itinerary.
  - [ ] Use these strategies/techniques to make your attendees as comfortable as possible:
    - [ ] Smile.
    - [ ] Speak more slowly than you would in person.
    - [ ] Mute notifications for all your other apps.
    - [ ] Focus only on the meeting for its entire duration.
    - [ ] Speak clearly and into your microphone (if you will be in a space with background noise, try a noise reducer like headphones or [Krisp](#))
    - [ ] Extend pauses after everything you say to give people plenty of time to weigh in.
    - [ ] Make "eye contact" by looking into your camera.
    - [ ] Frequently ask if anyone has any questions or additional thoughts.
    - [ ] Speak with your hands to encourage attendees to look at you and make eye contact.
    - [ ] Avoid looking at yourself. (Hide your view if you must.)
    - [ ] Acknowledge speaker contributions with a silent nod.
    - [ ] Call on attendees who haven't had a chance to say anything.
    - [ ] If your meeting is long, take breaks.
- [ ] Don't just end your meeting—close it

- ☐ Ask if anyone has any other thoughts to add
- ☐ Summarize key points
- ☐ Summarize next steps and clarify responsible parties
- ☐ Tell attendees you will send a follow-up email shortly so they know to watch for it.
- ☐ Follow up!