



Part One: Get Ready > 3. Bring champions together and launch your process

DESIGNING EFFECTIVE MEETINGS—SET UP, SAMPLE AGENDA AND SUGGESTED MEETING NORMS²³

A race, equity and inclusion planning process is built on a series of meetings. When you organize meetings that are engaging and focused, they will energize your team and keep them coming back. When you create meetings that allow people to bring their authentic selves and feel like their ideas are valued in ways that are honest, joyful and engaging, you're modeling what equity actually looks like day to day. Changing the way your meetings operate can be a powerful way to support a more equity-minded organizational culture.

IN THIS TOOL WE OFFER:

Five Elements of Agenda Design

These elements will support your preparation to maximize the relevance and effectiveness of each meeting.

A Sample Agenda Template

This sample illustrates how the elements of agenda design are reflected in a single meeting.

Suggested Meeting Norms

In all meetings—particularly those focused on race, equity and inclusion—norms help to set a productive tone and create a container within which the group can work through challenging discussions.

Notes

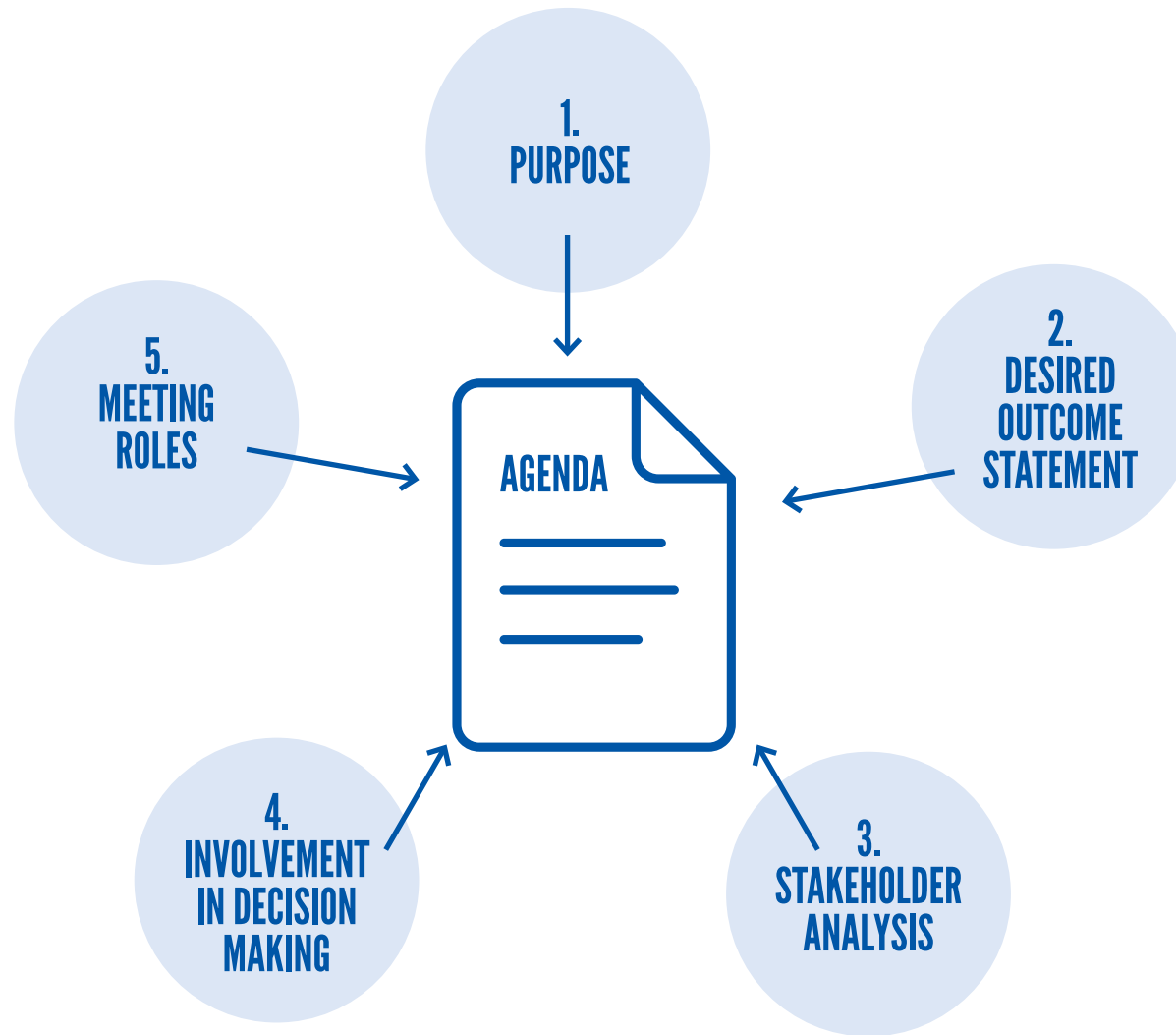


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SETTING UP YOUR MEETINGS FOR SUCCESS²⁴

As you and your team prepare meeting agendas, consider these five areas.





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SETTING UP YOUR MEETINGS FOR SUCCESS²⁴

<p>Purpose Why are we meeting?</p>	<p>Examples Include:</p> <ul style="list-style-type: none"> • Hear each other’s perspectives and build community • Celebrate success • Share information • Generate options • Develop recommendations • Develop a plan • Make decisions • Track process as plans are implemented
<p>Desired Outcome Statement What are the specific outcomes this meeting aims to achieve?</p>	<p>Examples Include:</p> <ul style="list-style-type: none"> • Share understanding of XYZ so we can do ABC • Prioritize list of options • Agree on XYZ
<p>Stakeholder Analysis Who has a stake in what will be discussed or decided? How can their interests best be represented in the meeting?</p>	<p>Once you’ve identified the stakeholders, ask yourself what they would consider to be a good outcome. Then ask yourself if they need to be in the meeting or how they can best inform the conversation (e.g., via survey or focus group before the meeting).</p>
<p>Involvement in Decision Making What level of involvement will participants have in the decision-making process?</p>	<p>First, be clear about who the final decision maker is for each topic the meeting will address. If the meeting participants are not the final decision makers, be clear with them about how the ideas generated in the meeting will inform the final decision. Make conscious choices about whether and how to gather input from absent stakeholders before the meeting begins and/or how to keep them informed after the meeting.</p>
<p>Meeting Roles Who will play various meeting roles?</p>	<p>Examples include:</p> <ul style="list-style-type: none"> • Facilitator (focuses on process) • Team leader (focuses on content/making sure the conversation gets to important outcomes) • Content manager (takes notes, manages information between meetings) • Hospitality and logistics • Energy watcher (watches for and calls attention to important group dynamics, facilitates ice breakers and energizers)

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SAMPLE AGENDA²⁵

Once you’ve answered the five questions for setting up your meeting, this template will help you to create a detailed facilitator’s agenda. You may decide to show less detail to meeting participants (e.g., delete the process column).

MEETING NAME
TIME
LOCATION OR WEB-LINK/CALL-IN INFO

Desired Outcomes

NOTE: Use these sample prompts to craft your desired outcomes. For each outcome that includes a decision either during the meeting or in the future, be sure to identify the decision maker(s).

By the end of the meeting, we will have:

- A shared understanding of _____, so that _____
Decision making: [NAME] will make the final decision
- An initial set of ideas about (or list of) _____
Decision making: [NAME] will make the final decision
- A prioritized list of _____
Decision making: [NAME] will make the final decision
- Agreement on _____
Decision making: Consensus with fall back to [NAME]
- Agreement on next steps



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SAMPLE AGENDA²⁵

Detailed Agenda

NOTE: For each desired outcome, identify the topic(s) you'll need to cover, the order in which you'll cover them and process tools to move through each topic.

TOPIC / CONTENT	HOW / PROCESS WE'LL USE	WHO / ROLES	TIME
Opening/Start Ups Welcome and introductions Getting in the room	<ul style="list-style-type: none"> Round robin/quick go-around One-word check-in/ reflection question 		10 minutes (replace with time on clock e.g., 10–10:10 am)
Roles (e.g., facilitator, time keeper, recorder)	<ul style="list-style-type: none"> Review Check for understanding 		10 minutes
Desired outcomes Decision making (with fallback) Agenda	<ul style="list-style-type: none"> Check for agreement 		
Norms	<ul style="list-style-type: none"> Present proposal Check for understanding Ask for any additions or changes Check for agreement 		10 minutes
Topic 1			
Topic 2			
Topic 3			
Closers Summarize agreements, check on whether we achieved all of our desired outcomes	<ul style="list-style-type: none"> Present, check for agreement 		
Next steps Planning for any parking lot/garden items that came up during the meeting			
Meeting evaluation	<ul style="list-style-type: none"> Plus/Delta 		
Close	<ul style="list-style-type: none"> One-word check-out 		

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SUGGESTED MEETING NORMS

Norms are behaviors that can help to create brave space for learning and planning together. The following norms have been especially useful to us in discussions and workshops focused on equity, diversity and inclusion.

Listen deeply

Listen for understanding, not to prepare your rebuttal. Don't interrupt people as they speak. Try to acknowledge what you've just heard the previous person say before you go on to make another point. When you hear something that's different from your own thinking or analysis, accept the speaker's description of their experiences as real for them, even if you haven't experienced or don't understand it.

Make "I" statements

Speak from your own experience rather than speaking for others, about others, or generalizing your experience assuming it applies to others. Avoid statements like "everyone knows that...", "we all feel that ...," or "we've all experienced ...". Instead, try "here's how I see it...", "in my experience...", or "here's what I've observed..."

Take space/make space

If you tend to talk early and often, challenge yourself to make space for others. If you tend not to talk much, challenge yourself to jump in.

Keep it here

Exercise good judgment and respect if people share personal stories. Carry away what you learned without sharing who said what.

We don't have to agree

When you disagree, challenge the statement or the behavior instead of the person. Avoid using blame, shame and guilt on yourself or others. Try saying "...yes and..." rather than "...yes but..." to make space for different views to be heard.

Be willing to be uncomfortable

Don't mistake discomfort for a lack of safety. It's possible to be safe and uncomfortable at the same time. Lean into the discomfort to see what you can learn.

Expect and accept a lack of closure

You may leave with more questions than answers and that's okay. We won't dismantle racism in a single meeting. Understand that the conversation was part of an ongoing journey.

Use "ouch" and "oops"

We may say something without intending to harm or offend, but harm or offense might result anyway. If we notice ourselves saying something regrettable, we can say "oops" and try again. If we notice others saying it, we can say "ouch" and share what was off-putting in a sentence or two. Use these teachable moments to highlight the difference between intent and impact in a straightforward way— again, no shaming or blaming—to flag things that hurt or offend.

Recognize the difference between intent and impact

Despite our best intentions, we can cause harm to others. Be willing to acknowledge and repair the offense first. Don't start by insisting on recognition of your good intentions.

Recognize the partial nature of our truth

Humility and perspective are essential. Remember that what you think may not be true. Even if it is, it may not be complete. And it may not be true for everyone.

Enable empathy and compassion

Empathy is about understanding and sharing in the feelings of others. Compassion is concern for the suffering or challenges of others.

Be present

Eliminate distractions so you can be in the moment physically, mentally and emotionally.