



Shifting Patterns Consulting

Collaborative Meeting Design & Facilitation Steps

1. **Connect with people who will be attending the meeting beforehand to obtain feedback on topics.** If it's a small group, schedule 1:1 conversations. For a larger group, send out a survey or do focus group interviews. Ask open-ended questions to find out what is working well, what can be improved upon, and what participants want to get out of the meeting.
2. **Use feedback obtained from meeting participants to prepare the agenda.** Review data collected to identify common themes across interviews and survey results. Use these themes to determine the purpose of the meeting and specific topics that will be discussed. Send out the agenda and common themes to participants in advance for review and feedback.
3. **Start the meeting with a check-in.** This helps participants transition from whatever they were doing before the meeting to being ready to participate. It also fosters connection by enabling people to get to know each other better. Each person takes a turn answering 2-3 questions, which could be about how they are doing, expectations for the meeting, and/or sharing something special about themselves.
4. **Generate and sustain active engagement throughout the meeting.** Depending on the purpose and structure of the meeting as well as how people like to work together there are a variety of participatory techniques and tools that can be used:
 - [4 Agendas for Collaborative Innovation](#) for engaging the whole person (i.e., head, heart, hands, and spirit) in meetings
 - [Liberating Structures](#) for small and large group activities
 - Technology that facilitates online brainstorming and collaboration, like Google docs and [MURAL](#)
 - Technology that facilitates live polling, Q&A, and decision making, like [Poll Everywhere](#), [Pownoodle](#), and [Slido](#)

5. **End the meeting with next steps and a check-out.** Summarize discussion highlights, including decisions made and action items (who will do what by when). Close the meeting with a check-out. This could involve asking participants to share how they are feeling in this moment, insights, and/or what they plan to do next.
6. **Follow-up with participants after the meeting.** In addition to sending out a recap of the meeting (e.g., notes, recording, materials) shortly afterwards, list action items in the email message so that everyone knows what needs to get done by when. Check-in with participants between meetings about how they are progressing with their tasks and offer assistance.

Need more help? Contact us to schedule a consultation: <https://shifting-patterns.com/contact>.

