Meeting Design Note

Working Group	
Meeting Short Title	
Timing	
Planning Team	
Why	
What	
How	
Who	

Guiding Questions

- Why do you need to meet? What do you want to accomplish? What's *most* important and is best accomplished in a meeting?
- If this meeting will replace an in-person one, how might you adapt to the virtual format?

Remember to keep it efficient, interactive, accessible, and connecting!

			Level of detail
why	**PURPOSE**	• Why are we meeting? • For what action- or information-oriented purpose?	Single statement
what	**DESIRED OUTCOMES**	• What are we trying to achieve? • What products or knowledge do we want to leave with?	Short list
how	**AGENDA**	• How will we get there? • What specific flow of activities will support us achieving our objectives?	Technology Detailed agenda Specific timings Process plan
who	**ROLES**	• Who needs to be in the meeting? • What roles need to be filled?	List of roles (at least two, up to six or more)

Adapted from Highly Effective Teams

PURPOSE

Action-oriented purposes	Information-oriented purposes
● Brainstorm ideas ● Make decisions ● Analyze data ● Plan a project ● Build teams ● Solve problems ● Evaluate performance	● Share information ● Get input ● Report on results ● Learn ● Network ● Socialize ● Celebrate

OUTCOMES

Products	Knowledge
● A list of _____ ● A plan for _____ ● A decision on _____ ● An agreement on _____	● An awareness of ___ so that.... ● A shared understanding of ___ so that....

Adapted from Highly Effective Teams and Interaction Institute for Social Change

Tech Notes

Tech support team	Names: [Insert Names] Join 30 mins early Backchannel contact info (cell #, Whatsapp, etc.)
Format	Zoom Meeting + Google Docs + Easy Retro
Zoom Host (can be changed once tech team is logged on)	Who: [Insert Name] ● Make other facilitators co-hosts ● Set it so participants can share screen ● Disable waiting room 5 mins prior to start to admit all participants ● Setup breakout groups (see below) ● Post a welcome message with link to shared google doc in chat as people join: ○ *WELCOME! As you settle in, please open up this shared Google doc:* <mark>*INSERT LINK*</mark>*. We will be using it throughout the meeting, so if you can, set up your screen so that you can see both zoom and your browser window. First thing, please add your name in the Roll Call in the google doc.*

	● If recording, hit record on Zoom, pause during break and breakout groups ● Monitor chat for tech needs, comments, Qs, and address or elevate
Zoom Co-Hosts	Who: [Insert Name] ● Regularly repost the document link as people join ● Can move in and out of breakout groups ● Monitor chat for tech needs, comments, Qs, and address or elevate
Participant Liaison	Who: [Insert Name] ● Send materials to participants ● Confirm attendance ● Communicate opportunities for asynchronous participation (review the notes, watch the recording, homework)
Google Doc / Note taking	Who: Everyone or a designated person ● Capture the highlights of people's comments, using their own words. ● Breakout groups will take their own notes into provided google doc templates
Screen sharing	Who: [Insert Name] ● Presenter(s) can share their own slides (or have one person designated to share slides - this should not be someone with other duties during the presentation) ● Backup - slides uploaded to shared drive

Breakout Group Details	Who: [Insert Name]
	
	● Breakout group settings
	   ○ Assignment: manual
	   ○ Length of countdown once rooms are closed: 60 sec
	   ○ Invite participants to join a room
	● Time - Breakout 1
	   ○ X groups of Y people, assigned based on this spreadsheet (add link) once everyone has joined the meeting
	   ○ Length: **XX mins**
	   ○ Broadcast message with a time check:
	   ○ After X mins: You are halfway through your time. Make sure you are capturing ideas in the meeting design template.

	○ 2 mins till rooms close: Two minute warning! ○ Close rooms after XX-1mins (they will then have 60 seconds to wrap up)
Video posting	Who: [Insert Name] ● If recording, post link to zoom recording in the google doc and in shared drive
What else?	