

WSCC TEAM

# MEETINGS

> Training Script



## Creating Engaging and Productive Meetings

### Purpose:

Provide team members with tools and agenda items necessary to make meetings engaging and productive.

### Objectives:

1. Describe at least two components to making meetings engaging and productive
2. Develop an action plan to utilize at least two components during an upcoming meeting(s)

### Training Materials:

#### Handout Packet

Handout 1: Key Points and Notes

Handout 2: Roles and Responsibilities

Handout 3: Sample Meeting Agenda Templates

Handout 4: Sample Meeting Minutes Templates

Handout 5: Action Planner

Handout 6: Additional Resources

Small beach ball or foam ball

Slide #	Time	Trainer Script and Directions	Resources Needed
<b>1</b>	1 minute	<p><b>WELCOME</b></p> <p>STATE: Good morning! Welcome to Creating Engaging and Productive Meetings. My name is _____.</p> <p>We've all been there. We've all walked out of a meeting saying to ourselves or maybe even out loud, "Well, there's an hour I'll never get back!" It's frustrating, to say the least. Today's training is designed to help us ensure that people don't walk out of our team meetings feeling that way.</p> <p><i>NOTE: Participants may introduce themselves during this time if they don't know each other and if time allows. Their introduction may include their name, position, and school/district/organization</i></p>	
<b>2</b>	1 minute	<p><b>AGENDA</b></p> <p>STATE: During this module, we'll cover essential components of meeting planning and implementation that will make our team meetings engaging and productive. Today, we'll focus on:</p> <ul style="list-style-type: none"> <li>• the purpose of a meeting</li> <li>• team member roles and responsibilities</li> <li>• agendas</li> <li>• norms or group agreements</li> <li>• task lists</li> <li>• meeting minutes</li> </ul>	
<b>3</b>	1 minute	<p><b>OBJECTIVES</b></p> <p>STATE: You'll be able to begin implementing these components right away. By the end of this module, you'll be able to:</p> <ol style="list-style-type: none"> <li>1. describe at least two of the components</li> <li>2. develop an action plan to utilize two components</li> </ol>	
<b>4</b>	1 minute	<p><b>MATERIALS</b></p> <p>STATE: Let's review the handouts you were given in the packet. You have several handouts:</p> <ul style="list-style-type: none"> <li>#1 Key Points and Notes</li> <li>#2 Roles and Responsibilities</li> <li>#3 Sample Meeting Agenda Templates</li> <li>#4 Sample Meeting Minutes Templates</li> <li>#5 Action Planner</li> <li>#6 Additional Resources</li> </ul> <p>We'll utilize these throughout the training.</p>	<p>Handout Packet:</p> <ul style="list-style-type: none"> <li>#1: Key Points and Notes</li> <li>#2: Roles and Responsibilities</li> <li>#3: Sample Meeting Agenda Templates</li> <li>#4: Sample Meeting Minutes Templates</li> <li>#5: Action Planner</li> <li>#6: Additional Resources</li> </ul>

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5	5 minutes	<p><b>WARM-UP ACTIVITY</b></p> <p>STATE: Let's take a look at Handout #1: Key Points and Notes. This will be our primary handout for the training.</p> <p>Please write down your response to one of the first two questions on the sheet.</p> <p><i>If you are currently participating in team meetings, is there anything you would like to improve about your meetings?</i></p> <p><i>If you are not participating in team meetings, describe an effective meeting.</i></p> <p>Let's take 2 minutes to think and write. Be ready to share with the group.</p> <p><i>DO: Give participants 2 minutes to consider their answer. Bring the group back together and facilitate a discussion about what participants would like to improve about their meetings or what an effective meeting looks like. Allow 2-3 participants to share their answers.</i></p> <p><i>NOTE: After asking a question, pause to allow participants time to formulate their verbal answer and volunteer to share.</i></p> <p>STATE: Great discussion! Keep those improvements in mind as we go through the module. Let's get started!</p>	Handout #1: Key Points and Notes
6	1 minute	<p><b>PURPOSE OF A MEETING</b></p> <p>STATE: Let's start with why we are having a meeting. What is the purpose of the meeting? Do we even need to have a meeting?</p> <p>Team members' time is valuable and sometimes scarce, so make the most of the time the team has together. Meetings need to move our work forward in an efficient manner. Meetings should be a time for action — which includes discussion, decision-making and planning. During meetings, try to avoid announcements or updates unless they pertain to the action items on the agenda. These can be provided in an email, newsletter or other communication method that your team members use.</p> <p>If you find there are no agenda items that need action, meaningful discussion, a decision, or planning time, then <i>you don't need a meeting!</i> Instead, send timely updates, announcements, and a reminder about the next scheduled meeting to your team members and give them the gift of time!</p>	

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7	5 minutes	<p><b>ROLES AND RESPONSIBILITIES</b></p> <p>STATE: All team members can play a role in meeting preparation and implementation. Include all members to increase ownership in the work you are doing and distribute the workload among members.</p> <p>Let’s take a look at some roles for your team members. Find Handout #2: Roles and Responsibilities worksheet. Draw a line to match the role with its description. I’ll give you a minute to complete this task.</p> <p><i>DO: Allow participants a few minutes to complete the worksheet.</i></p>	Handout #2: Roles and Responsibilities
8	2 minutes	<p>STATE: Let’s review your answers.</p> <p><i>DO: Review the answers using the slide and answer key.</i></p>	
9	1 minute	<p><b>AGENDA</b></p> <p>STATE: Another important component of an effective meeting is an agenda. A thoughtful agenda is a critical tool for team and meeting success. It provides a “guide” for each meeting to keep the participants and the work on track. An agenda states what will take place and what will be accomplished during the meeting.</p> <p>There are several ways to develop your agenda. You will most likely have standing items such as: review of agenda and minutes, review of norms (we’ll talk about these in a minute), a warm-up or icebreaker, and discussion and planning for current or future projects. The meeting facilitator should review the previous meeting minutes to determine agenda items for the next meeting. About two weeks before a meeting, send an email with a draft agenda and ask team members for additional items.</p> <p>Send the final agenda, meeting materials, and time and location to team members at least a week beforehand. Let them know what they need to do to prepare for the meeting, such as read a proposal or generate a list of ideas for the next fundraiser. Assigning “homework” saves you time during your meeting. Spending your meeting reading reports or reviewing data is not a productive way to spend your meeting time.</p>	

Slide #	Time	Trainer Script and Directions	Resources Needed
10	2 minutes	<p>Meeting facilitators can utilize two agendas — one for the facilitator and one for participants. The facilitator agenda includes more details than the participant agenda.</p> <p>Let’s look at an example of each.</p> <p>QUESTION: Here’s the facilitator agenda. What items do you notice on this agenda? Take a moment to jot them down on your Key Points and Notes handout.</p> <p><i>DO: Let participants look at Slide 10 for and make notes on the agenda items.</i></p>	Handout #1: Key Points and Notes
11	5 minutes	<p>QUESTION: Now, let’s look at the participant agenda. What differences do you notice? Take a moment to jot them down on your Key Points and Notes handout.</p> <p><i>DO: Show Slide 11 and pause to let participants read the agenda. Facilitate a discussion about the differences between the facilitator agenda and participant agenda.</i></p> <p>STATE: There are many free, downloadable meeting agenda templates available online. Find your Handout #3 Sample Meeting Agenda Templates to see a few. They have many of the same items we just discussed, such as desired outcomes, person responsible, and time allotted. Use search phrases like “free meeting agenda template” or “school team agenda template.” Find one that works for your team or make your own with the agenda items you want to include.</p>	Handout #1: Key Points and Notes  Handout #3: Sample Meeting Agenda Templates
12	3 minutes	<p><b>PROCESSING</b></p> <p>STATE: Take a moment to jot down any notes you want to remember about meeting purpose, the agenda, and roles and responsibilities on your Key Points and Notes handout.</p> <p><i>DO: Give participants 1 minute to write down any notes on their Key Points and Notes handout.</i></p> <p>QUESTION: What key points stand out to you so far?</p> <p><i>DO: Facilitate a short discussion (comments from 2-3 participants) to process the question above about the meeting purpose, agenda, and roles and responsibilities.</i></p> <p>STATE: Thanks for sharing! Let’s keep going!</p>	Handout #1: Key Points and Notes

Slide #	Time	Trainer Script and Directions	Resources Needed
<b>13</b>	2 minutes	<p><b>NORMS OR GROUP AGREEMENTS</b></p> <p>STATE: Norms are another essential component for your meetings. You may also hear norms referred to as “group agreements.” The terms can be used interchangeably and essentially define how the team will conduct itself and work together during meetings. This is an important task for your first meeting. Plan to spend about 20 minutes developing a list of norms for your team meetings.</p> <p>Some examples include:</p> <ul style="list-style-type: none"> <li>• come prepared</li> <li>• start and end on time</li> <li>• be present</li> </ul>	
<b>14</b>	3 minutes	<p>STATE: Here are a few key tips about norms:</p> <p>The team should develop norms together as a group and in-person. This is an important task to complete and is time well spent as it creates ownership in the norms and accountability for behavior.</p> <p>Keep phrases positive rather than negative. Think about them in terms of “what will you do.” For example, be on time versus don’t be late.</p> <p>Clarify any suggestions so that everyone understands the intent for each norm.</p> <p>Come to a consensus on the list. Everyone needs to be able to live with these norms. Norms are a living document. The team can add to, remove, or edit them at any time to improve meeting and group functioning.</p> <p>Post norms at each meeting so everyone can see them at all times, for example, on chart paper on the wall or on the printed agenda.</p> <p>Review norms at the beginning of each meeting. The meeting facilitator will ask if there are any changes that need to be made and, if not, ask for an agreement on the norms. If someone suggests a change, take the time to discuss it and come to a consensus on any changes. Be sure to update the norms for the next meeting.</p> <p>Once your norms are developed, figure out how team members will let others know that a norm is being challenged or broken. Do they let the facilitator know and the facilitator will handle the situation? Will team members speak up during a meeting on their own?</p> <p>However the team decides to handle this, it is critical to not embarrass others, draw attention to an individual, or create an unsafe environment. Say something like, “Before we go on, let’s review our norms, in particular ‘Be present.’ Let’s bring our focus back to the next agenda item.”</p>	

Slide #	Time	Trainer Script and Directions	Resources Needed
15	2 minutes	<p><b>PROCESSING</b></p> <p>STATE: Take a moment to jot down any notes you want to remember on your Key Points and Notes handout.</p> <p><i>DO: Give participants 1 minute to write down any notes on their Key Points and Notes handout.</i></p> <p>QUESTION: What norms would you like to suggest when your team develops its own norms?</p> <p><i>DO: Lead a short discussion (comments from 2-3 participants) to process the question.</i></p> <p>STATE: Those are great ideas! Thanks!</p>	Handout #1: Key Points and Notes
16	1 minute	<p><b>TASK LIST</b></p> <p>STATE: To keep the work moving forward, a task list is developed at the end of each meeting. This list includes a list of action steps to be completed, who will complete each task and when the task will be completed.</p> <p>This tool will distribute the workload among the team, provide accountability, and keep the work moving forward.</p> <p>Throughout the meeting, record the action steps as they are identified. As a team, review and determine if any action steps are missing at the end of the meeting. Identify who will complete each action step and when it will be completed. This is a great opportunity for team members to volunteer for tasks that highlight their strengths and that they enjoy. The task list will be included with the meeting minutes.</p>	

Slide #	Time	Trainer Script and Directions	Resources Needed
17	4 minutes	<p><b>MEETING MINUTES</b></p> <p>STATE: Meeting minutes for your team meetings don't need to be formal or tedious. Let's look at a sample meeting minutes template. Minutes should capture who was in attendance, topics covered, decisions made, and the task or to-do list. Remember to use a consistent template or format for your meeting notes.</p> <p>If possible, find a digital location to share meeting agendas, minutes, and other materials. Be sure all team members have access to these files.</p> <p>Be sure to send or post meeting minutes and materials within a few days of the meeting.</p> <p>Like agenda templates, there are meeting minutes or notes templates available online. You might consider using your agenda template and adding space to capture the meeting notes, discussion, and tasks. Find Handout #4: Sample Meeting Minutes Templates handout and take a look at some examples. Again, use templates as your inspiration but create and use a format that works for your team</p>	Handout #4: Sample Meeting Minutes Templates
18	15 minutes	<p><b>TAKING ACTION</b></p> <p>STATE: Let's take some time to develop a plan to implement some of the tools we learned about today.</p> <p>Here are your instructions:</p> <ol style="list-style-type: none"> <li>1. Review components on Key Points and Notes handout.</li> <li>2. Choose at least two components you would like to utilize or implement at an upcoming meeting.</li> <li>3. On Handout #5: Action Planner, write down the tasks you need to complete to make it happen. Identify who will be responsible and when the tasks will be completed.</li> <li>4. Be ready to share with the group.</li> </ol> <p>Can I clarify anything before you begin?</p> <p><i>DO: Answer any questions. Give participants 10 minutes to complete their action steps.</i></p> <p>STATE: Let's come back together now. What component(s) did you choose and what are your actions steps?</p> <p><i>DO: Depending on time, allow 2-3 participants to share their action steps.</i></p>	Handout #1: Key Points and Notes Handout #5: Action Planner



Slide #	Time	Trainer Script and Directions	Resources Needed
19	1 minute	<p><b>REVIEW</b></p> <p>STATE: Sounds like you have some good ideas and plans to make your team meetings more engaging, effective, and productive! As your team meets, add more of the components covered in this module.</p> <p>We covered several components you can incorporate into your meeting planning and implementation:</p> <ul style="list-style-type: none"> <li>• the purpose of a meeting</li> <li>• team member roles and responsibilities</li> <li>• agendas</li> <li>• norms or group agreements</li> <li>• task lists</li> <li>• meetings minutes</li> </ul> <p>Be sure to review the resources list for even more ideas. Find ideas that address your specific challenges and use what works for you.</p> <p><i>DO: Show participants the Handout #6 Additional Resources.</i></p> <p>Remember, meetings are a time for action and can move your team’s work forward if planned properly.</p>	Handout #6: Additional Resources
	4 minutes	<p><b>CLOSING ACTIVITY</b></p> <p>STATE: To wrap up this module, let’s play Hot Potato! Let’s gather in a circle. I’m going to toss this ball to someone and they will quickly share one thing they learned today that will help improve their team meetings or that they will use with future meetings. That person then tosses the ball to someone else!</p> <p><i>DO: Let participants gather in a circle. Toss the ball to the first person.</i></p>	Small beach ball or foam ball
20		<p>STATE: Thanks for playing and for your participation in the training! Incorporating what you have learned about effective meetings will help your team be a huge success!</p> <p>My contact information is listed on this last slide should you have any questions.</p> <p>Please complete the training evaluation.</p> <p>Thank you!</p>	

**TIME RECOMMENDATIONS:**

For a 45 minute session, omit slides 5, 7 and the closing activity.

**REFERENCES:**

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