

Meeting orchestration chart explained

The quick plan (page 46) helps when there is little time for planning. When time is available, however, thorough planning is invaluable in leading to a successful meeting. Many frameworks or outlines are available that can be adapted by facilitators. MAD created the *meeting orchestration chart* (above) as a comprehensive planning tool.

The following list helps explain the *meeting orchestration chart*. It begins with the meeting subject and date. This is as basic as you can get, yet critical: meeting designers often disagree about the real purpose of a meeting, and sometimes writing down the date is a planning team's first realization of how little time remains before the event.

Identify meeting purpose

Subject: Identify the meeting topic/subject.

Date: Date and time of meeting.

Rational and Experiential Objective: With the meeting sponsor, talk through and agree on the rational and experiential objectives for the meeting.

Rational objective: goals and purpose of meeting

Experiential objective: what experience do you want the group to have? How do you want the group to feel when the meeting is done?

Plan meeting components and create agenda

Opening: Decide how you will open the meeting and get on stage. This may include:

Introductions

Icebreaker

Opening conversation

Roles of the facilitator and other key participants such as convener, scribe, chart-writers, etc.

“Invocation” (have a “higher up” such as the commissioner or director authorize the meeting’s purpose)

I. Movement 1

Plan how you will unite the group. Typically, this can be done by reviewing the agenda and sharing basic contextual information. You may also ask the group a warm-up question to get people talking. Setting the context may also include:

- Discussing the format of the meeting

- Reviewing why the group is together (purpose, mandate, anticipated outcomes)
- Clarifying the expectations of the meeting or project
- Explaining how the results of the meeting will be used after the meeting
- Reviewing the “givens” of a situation
- Going over assumptions central to the work of the group (so the participants, facilitator or leadership will not be surprised)
- Identifying boundaries/parameters (time, space, deadlines, resources, etc.)
- Sharing operating agreements (the group may create these, or the facilitator may suggest some initial ones)
- Talking about how decisions will be made within the discussion and how participants will know when a decision has been made

II. Movement 2

Plan the agenda items. This part of the meeting focuses the group by delivering the meeting content. Decide the appropriate order for the agenda items. For each content item, create process steps and potential timing within the meeting framework. Decide on the right process and medium to share the content. Ideas include:

- PowerPoint presentation
- Panel discussion
- Small break-out groups
- Lecture/presentation
- Handouts/discussion
- Brainstorm activity
- Workshop Method
- Group activity (Kaner Chapters 14–16 provide several examples of possible activities)

III. Movement 3

Plan a transition to the meeting resolution. Summarize what happened; discuss concluding points, review decisions made, next steps and assignments, etc.

Closing

Don't forget to thank the group for their participation and acknowledge everyone's time and commitment.

Self-reflection

Facilitator stance and style: What attitude do you want to portray? What mind-set do you need to be in to facilitate this meeting? Examples include:

non-judgmental, supportive, fair, firm, professional, tolerant, patient, sympathetic/empathetic, strong, collegial, flexible, focused, consistent, enthusiastic, affirming, serious with a light touch, authentic, objective.

How do you want to dress for this particular audience?

Drama or mood: plan transitions, timing, pacing, rituals, and overall mood of meeting.

Other meeting considerations

Space: Find out the room layout before the meeting date (visit the room if possible). Check on space options for small group breakout sessions

Plan seating arrangement (see page 38 for room arrangement details and examples)

- (For in-person meetings) Materials: Pack all the materials you will need during the meeting.
- (For online meetings) Reserve meeting platform, plan for any additional tools, such as polls, document sharing, or brainstorming programs
- Pre-meeting work:
 - Prepare materials needed.
 - Conduct research on the topic you are facilitating to orient yourself to acronyms and specialized language that might be used during the meeting.
 - Review the draft plan to think through possible variations of approaches chosen. For instance, how would the process differ between a small group and a large group?
 - Review the plan with the meeting sponsor and appropriate stakeholders and make adjustments based on their suggestions/comments.
 - Consider potential back-up plans in the event technology fails or a presenter doesn't show. What will you do to fill in that agenda item?
 - Use principles of universal design when you address the need for accommodations for participants with disabilities. Pp. 70-72 below include specific suggestions.

Diversity, Equity and Inclusion (DEI): Consider the ways your meeting will work for everyone involved through the lens of diversity, equity and inclusion. See Pp. 73-74 for specific suggestions.

Meeting orchestration chart

Subject		Date		Location		Attendance			
RATIONAL OBJECTIVE				EXPERIENTIAL OBJECTIVE					
Opening: Get on stage		Movement I: Unite the group		Movement II: Focus the group		Movement III: Mobilize the group		Closing: Get off stage	
Time		Time		Time		Time		Time	
Facilitator stance			Space and materials			Drama or mood			
Pre-meeting activity, communication					Post-meeting activity, communication				
Accommodations (for example: accessibility of documents, interpreters, meeting room set-up, such as reserved seating for interpreters, space for wheelchairs, etc.)									