HOLDING EFFECTIVE MEETINGS

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THE ARENA

OVERVIEW

This guide is designed to help Campaign Managers plan and facilitate effective meetings and calls with their teams, consultants, vendors, and key stakeholders. This guide will help you avoid "meeting just to meet," by laying out an approach for designing your meetings with purpose, monitoring progress toward goals, gathering input and feedback, and making asks of critical stakeholders.

GUIDING PRINCIPLES

1. **Articulate your purpose.**
   Articulating the purpose of the meeting and the desired outcomes are the most commonly skipped steps in preparing for a meeting. Too often we simply throw together an agenda or get everyone in the room/on the phone, without having clearly defined *why*. We have all been in under-prepared meetings: the meeting lacks focus, participants get frustrated, or participants get bored and tune out, or the meeting yields no actionable next steps. Before you write an agenda or schedule the meeting, articulate what you hope to achieve on the call. In fact, we recommend stating the purpose of the call at the top of the agenda. The key is to be as specific as possible about the one to two things that are most important for this meeting – what action do you want participants to engage in, and what do you want to accomplish by the end of the meeting?

   Here are some examples:

   - Ex: The purpose of this call is <u>to align on</u> messaging for the paid media plan.
   - Ex: The purpose of this call is <u>to share</u> the results of our recent poll and create the opportunity for the team to ask questions.
   - Ex: The purpose of this call is to <u>gather feedback</u> on the mail piece before we send it out next week.
   - Ex: The purpose of this call is for consultants <u>to weigh in</u> on a number of press requests we have received.
   - Ex: The purpose of this call is <u>to brainstorm</u> how we can expand our team's organizing capacity in the next month.

- Ex: The purpose of this call is for our team to report individual progress toward goals in order to hold ourselves accountable

- Ex: The purpose of this call is to brief the team on tomorrow's surrogate event.

2. Tell participants how to prepare.

This might sound simple, but if you don't tell participants how to prepare, chances are they won't prepare at all. Make sure that you send out the agenda and any accompanying materials with enough time for people to read it — we recommend doing this at least 24 hours before the meeting at minimum. If you share attachments, be sure to state what needs to be read in advance and with what level of attention.

Here are a few examples of what this might sound like:

- I've attached a copy of our campaign plan. Please be sure to give it a thorough read before our call on Friday.

- I've attached a presentation on the major takeaways from the focus group. We will go over this on the call on Friday, but please give it a quick perusal and come prepared with your questions.

- I've attached our progress to goal report for the week as an FYI. We won't have time to cover this on the call, so please reach out to me if you want to discuss.

- Here is a link to the rough cut of the video ad. Please watch by end of day tomorrow, and send your notes to me by end of day Thursday so that we can review and summarize everyone's initial feedback in advance of our discussion.

Other preparation details to consider:

- Is there anything your participants need to create or write in advance of the meeting?

- If it is a video call, will you be screen-sharing? If so, be sure to note in advance that participants need to be on video and not just a dial-in.

- Are there any questions you want participants to consider and come prepared to discuss?

3. **Be present.**

This is typically the most difficult thing to control for, but it's also the most important. Keeping everyone engaged and free of distraction is your job as the facilitator of the meeting. The first and most basic thing you can do is to model the level of presence and engagement you want to see from the group. Listen and make eye contact with participants as they are talking. Minimize your use of technology. If it's an in-person meeting, be sure to close your laptop and put your phone away if you can.

Not only can you model the behavior, but we recommend explicitly setting norms at the beginning of the meeting. You can even write these up and include them with the agenda you circulate.

Some good norms to consider:

- **Turn off phones and laptops.** Turn off phones and laptops except for emergencies. You might even collect phones in a bowl as participants enter the room or ask participants to put their phones in the middle of the table before the meeting begins.

- **Encourage participation.** You can make it clear that you will be cold calling. If you make this a norm, and state up front that you will be cold-calling on people, they are more likely to tune in and stay that way.

- **Make a parking lot.** Create a parking lot for topics that come up that need to be addressed, but aren't relevant to the immediate conversation at hand.

- **Mute microphones.** Ask people to mute themselves when they aren't talking on the conference call. The same goes for an in-person meeting: refrain from side-talk.

- **Designate a timekeeper.** Assign a timekeeper or remind everyone that you will be keeping time and moving things along when necessary to keep to your agenda.

- **Assume best intentions.** It's great to say it upfront: we want to assume best intentions from everyone, and if you disagree with someone that's said, ask questions so that the speaker has an opportunity to clarify.

Calls are more difficult, but there are a few things you can do to keep people engaged:

- **Use video whenever possible.** It's harder for participants to multi-task if they know you are looking at their face on your screen. Zoom, Blue Jeans, Google Hangout, GoTo Meeting, and Adobe Connect are all great options for video conferencing platforms.

- **Cold call.** This means calling on someone to answer your question when no one speaks up after you have asked it.

- **Ask for undivided attention when you need it.** Let participants know if they need to be in a quiet place or in front of their computer for the call. Unfortunately, multi-tasking is the default these days, so if you require someone's full attention, you have to ask them for it.

- **Assign a note-taker.** Having responsibility for capturing information will reinforce the need to engage and pay attention. Create a note-taking template for your meeting, (Google docs are great for this) and share it with the group in advance.

4. Wrap up and repeat back!

Every call should end with a read out of themes and next steps. Be sure to save a few minutes for this in your agenda. Repeat back to the group what you heard, what was accomplished, and what your next steps are. This will help to ensure that you are all aligned on any decisions that were made, that you understand any input/feedback that was given, and that you are all on the same page about what needs to happen next.

As much as possible, you should try to assign an owner and a timeline for each action item. This often gets skipped in conversation. If it does, take time at the end of the call to go back to your action items and go through this process.

After the call, be sure to send out notes – you may not need minutes of the call itself (not everything requires a play-by-play), but it is important that you capture the major highlights and next steps in writing. This will create accountability and a point of reference for future meetings.

DO’S AND DON’TS

Below, we’ve synthesized our Do’s and Don’ts for meetings and calls. If it’s helpful to you, you can print this out and share it with your team.

DO

- State the explicit purpose of the meeting (brainstorm, input, share out, etc.)
- Set and share an agenda in advance of the meeting
- Find a time that works for all participants
- If the meeting is recurring, put it on the calendar for the same time each week
- Give participants a 2-minute grace period to join before beginning the meeting
- Use your first call/meeting to establish norms and revisit them as necessary
- Tell participants what they need to do to prepare for the meeting
- Listen as much as you talk (unless your meeting is a briefing)
- Model being present, and minimize the use of technology during in-person meetings
- Send important materials before the call or meeting, with instructions on how participants should engage with the material
- When remote, use video calls as much as possible
- Have clear asks, and don’t be afraid to cold-call on people
- Send around notes and next steps with clear owners and timelines
- Cancel the meeting if you don’t have clear goals for the conversation

DON’T

- Constantly change the meeting time or show up more than 5 minutes late
- Multitask
- Hold a meeting with no explicit purpose or agenda (meeting just to meet)
- Spend the entire meeting updating the group
- Skip intros if the people in the meeting don’t know each other
- Skip ice-breakers because it “feels awkward”
- Crowd-source decision-making in the moment
- Shame or embarrass someone in front of the group
- Argue or engage in disrespectful dialogue
- Allow one person to derail the conversation
- Interrupt or speak over people in the meeting
- Ask questions and then answer them yourself if no one responds
- Bring a bad attitude to a meeting or call
- Forget to mute yourself if you have background noise

SAMPLE AGENDAS

CAMPAIGN LEADERSHIP MEETING

Purpose of This Meeting:

- Align on the week's priorities
- Review progress toward goals
- Share any new information that is critical to the team's success
- Troubleshoot issues/brainstorm solutions to challenges as a team

Participants:	Candidate, Campaign Manager, Organizing Director, Finance Director, Communication Director, Digital Director, Data Director
Mode:	If possible, this meeting should be in person, and there should be established norms for when it is appropriate to participate remotely.
Length:	45 minutes - 1 hour
Frequency:	Weekly (initially) or twice weekly (closer to Election Day)

Example Meeting Agenda

1. This Week's Priorities (Campaign Manager shares out) 15 minutes
2. Progress Toward Goals (Department Leads share out)
   a. Organizing & Data 2 minutes
   b. Communications 2 minutes
   c. Digital 2 minutes
   d. Finance 2 minutes
3. Polling/Messaging Update (Communications Director leads) 15 minutes
   a. Key takeaways from poll
   b. New talking points for press, volunteers, and voter contact
4. Brainstorm Earned Media Opportunities (Campaign Manager leads) 15 minutes
   a. Review narrative push
   b. Brainstorm validators & locations for events
5. Wrap up and Next Steps 5 minutes

CONSULTANT CALL

Purpose of This Call:

- Align on priorities for the week ahead
- Solicit input or feedback from the group on strategic decisions
- Brainstorm creative approaches and solutions to challenges as they arise
- Check in on deliverables and provide project updates

Participants:	Candidate & Campaign Manager (+Department Leads if topic demands), Consultants, Vendors, Senior Advisors
Mode:	Call (video if possible)
Length:	45 minutes - 1 hour
Frequency:	Weekly

Example Call Agenda

Note: this agenda should change every week, but should be focused and purposeful! This should *not* only be the campaign manager giving updates to all of the consultants, though you should probably provide a brief update each week to kick off the call. The majority of the time on your call should focus on: 1) having consultants share plans with the full group, 2) aligning on messaging and timing for various programs, 3) collecting input on strategic decisions, or 4) collecting feedback on draft deliverables (ex: ads, mail, scripts, digital content). If there's nothing that needs to be discussed in a given week, don't be afraid to cancel the call and share updates via email. Remember, don't meet just to meet.

1. State of the Race (Campaign Manager) 10 minutes
    a. Finance (cash on hand, upcoming events, progress to quarterly goal)
    b. Organizing (weekly progress to goals for capacity building, attempts/conversations)
    c. Communications (any messaging updates, highlight earned media, upcoming events)
2. Media (Media consultant) 30 minutes
    a. Full group watches rough cut of video ad
    b. Full group feedback
        - Keep
        - Cut
        - Change

3. Digital (Digital consultant) 10 minutes
    a. Review highlights and data from previous week
    b. Preview plan for week ahead
4. Priorities and Next Steps 5 minutes

FINANCE COMMITTEE CALL

Purpose of this meeting:

- To build relationships with donors and bundlers
- To say thank you, deepen understanding of campaign strategy, and increase buy-in
- To plan for big fundraising events and milestones
- To share an update on progress toward goals

Participants:	Campaign Manager and Finance Director (+Department leadership and consultants as topic demands), Finance Committee Members, High Dollar Donors/Bundlers
Mode:	Call (in person when possible)
Length:	30 minutes - 1 hour
Frequency:	Every two weeks

Example Call Agenda

1. Welcome and Intros (Campaign Manager, Finance Director) 5 minutes
2. State of the Race (Campaign Manager) 15 minutes
    a. Highlights from the campaign trail (press, events, messaging)
    b. Progress to goal (doors knocked, conversations held, volunteers engaged)
    c. Q & A
3. Fundraising Update 5 minutes
    a. Total raised
    b. Cash on hand
    c. Fundraising milestones
    d. Progress to quarterly goal
4. Call to Action & Next Steps 5 minutes
    a. Priorities for next two weeks
    b. Asks for the group (hold events, bundle, recruit event hosts)

VOLUNTEER CALL

Purpose of This meeting:

- To build and maintain relationships with volunteers
- To say thank you and celebrate collective accomplishments
- To deepen understanding of overall strategy, increase volunteer participation and buy-in

Participants:	Candidate, CM/Organizing Director (Facilitator) and Organizers, Volunteer Leaders, Volunteers
Length:	30 minutes
Frequency:	Once a month

Example Call Agenda

1. Welcome and Campaign Update (Campaign Manager) 15 minutes
    a. How the campaign is doing
    b. Campaign highlights (doors knocked, events held, press, public figures for $ raised)
    c. The campaign's message
    d. Introduce candidate
2. Thank you & What's Net (Candidate) 10 minutes
    a. Thank you & acknowledgement for the work volunteers are doing
    b. How this work helps us win
    c. Priorities moving forward
    d. Call to action (e.g.: We are kicking off our house meeting program next week, and we need your help!)
3. Next Steps / How We Move Forward (Campaign Manager/Organizing Director) 3 minutes
    a. Preview of upcoming program milestones (e.g. Day of Action, program kick off, goals)
    b. Hard Ask (how to sign up for specific action on specific timeline!)
4. Thank you and Closing (Campaign Manager/Organizing Director) 2 minutes