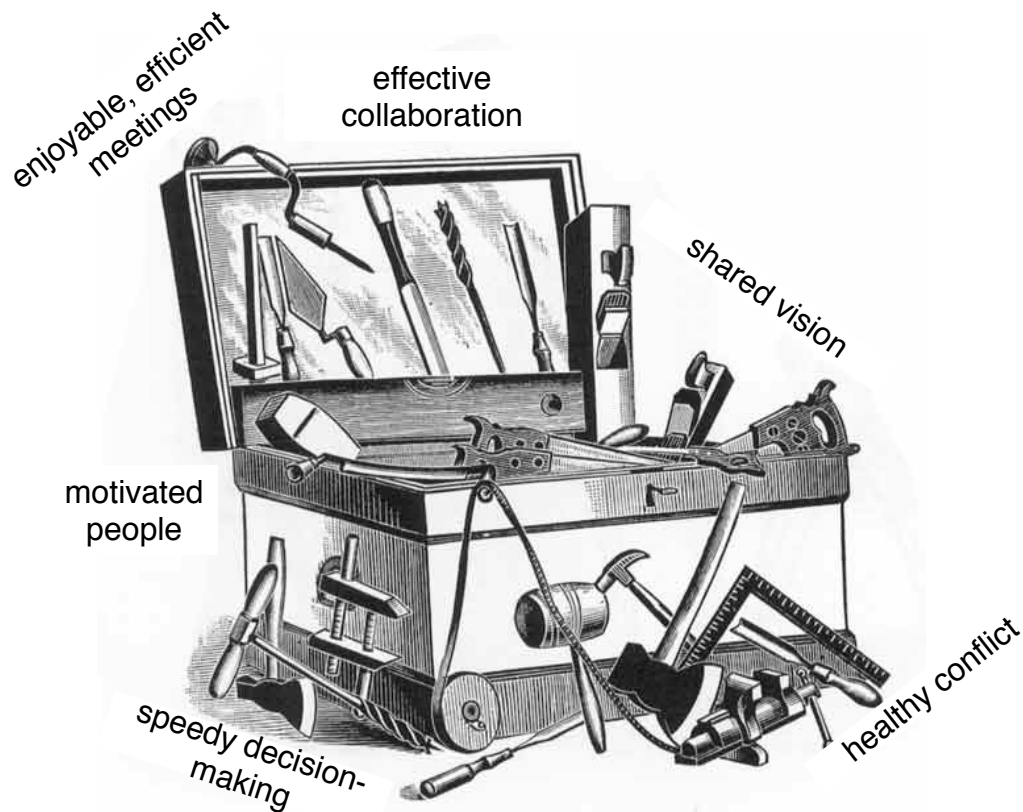


Effective Groups Toolkit

draft v8



Practical tools to help people create groups & organisations that are more effective, enjoyable & successful

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These are the fundamental areas of group life. All of these need to be given attention for groups to be effective, successful and fun

These are the key topics in each area which need to be attended to

These are specific tools, processes and worksheets that you can do with your group to improve group effectiveness

Introducing the Effective Groups Toolkit

Do you want to 'get things done' with other people?

If you want to get anything done with other people, in an organisation, a team or any kind of group, but don't want to do it in a hierarchy (either visible or invisible), and if you want to be more collaborative, then you'll soon discover that group life is complex!

A lot of people say "my group (or team, or organisation) is doing ok, well, except for the people!". People are like electric cables: just like when you go travelling you can neatly pack your cables of your laptop and phone chargers, then when you arrive, they are mysteriously all tangled around each other! People are a bit like this, when we start working together we can be all separate individuals, but very soon there is a complex tangle of invisible dynamics going on!

From Hierarchy to Collaboration

Most of us have grown up in some kind of hierarchical structures: families, schools, many workplaces, politics and more, and we are so used to them that its easy to take them for granted. Many people are experiencing limitations with hierarchical structures which fit better into a stable environment, where things can be predicted and controlled.

Many people are now wanting to move away from working and living in these kinds of structures to create different kind of power relationships, based on values like equality and the inclusion of multiple perspectives to work more collaboratively. These kinds of groups are better suited to deal with more complex environments, they value collaboration and participation and seek to move away from hierarchical and towards flat power structures.

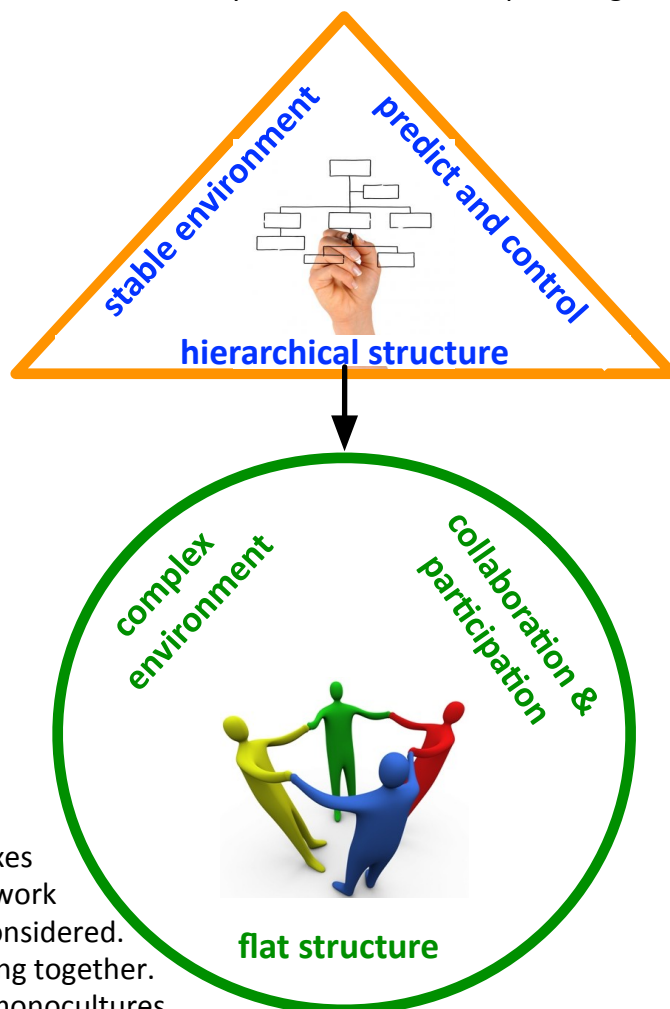
Groups as Systems

One of the difficulties of this is that there are no quick fixes or single solutions for this to make this happen. Groups work like systems where the system as a whole needs to be considered. It requires a paradigm shift in how we think about working together. Its a bit like the shift from conventional gardening with monocultures, fertilisers and pesticides to control what happens, to gardening more how natural eco-systems like forests work.

To do this, attention needs to be paid to the individual parts, the relationships between them and the whole of the system all at the same time. In a group this means working with some of the invisible things which can get us tangled up with each other. This is unfamiliar for many of us but there are tools which can help us do this.

Using this Toolkit

This toolkit is a collection of tools which can help you do this, to help us deal with the complexity of group life, so that we can make use of the social technology that has emerged in the last few decades that make hierarchical, collaborative and agile groups work better. So that we can create effective groups, teams and organisations that are successful and fun to be in. Initially this toolkit is aimed primarily at people who want to work in more collaborative ways with each other. Over time, more tools will be added to support healthy hierarchies and also how to create more agile organisations which are able to respond quickly and steer dynamically in fast-changing environments. To use this toolkit, look at the top of the page of each tool to find it if could be helpful to your situation, then have a go at the activities with your group.

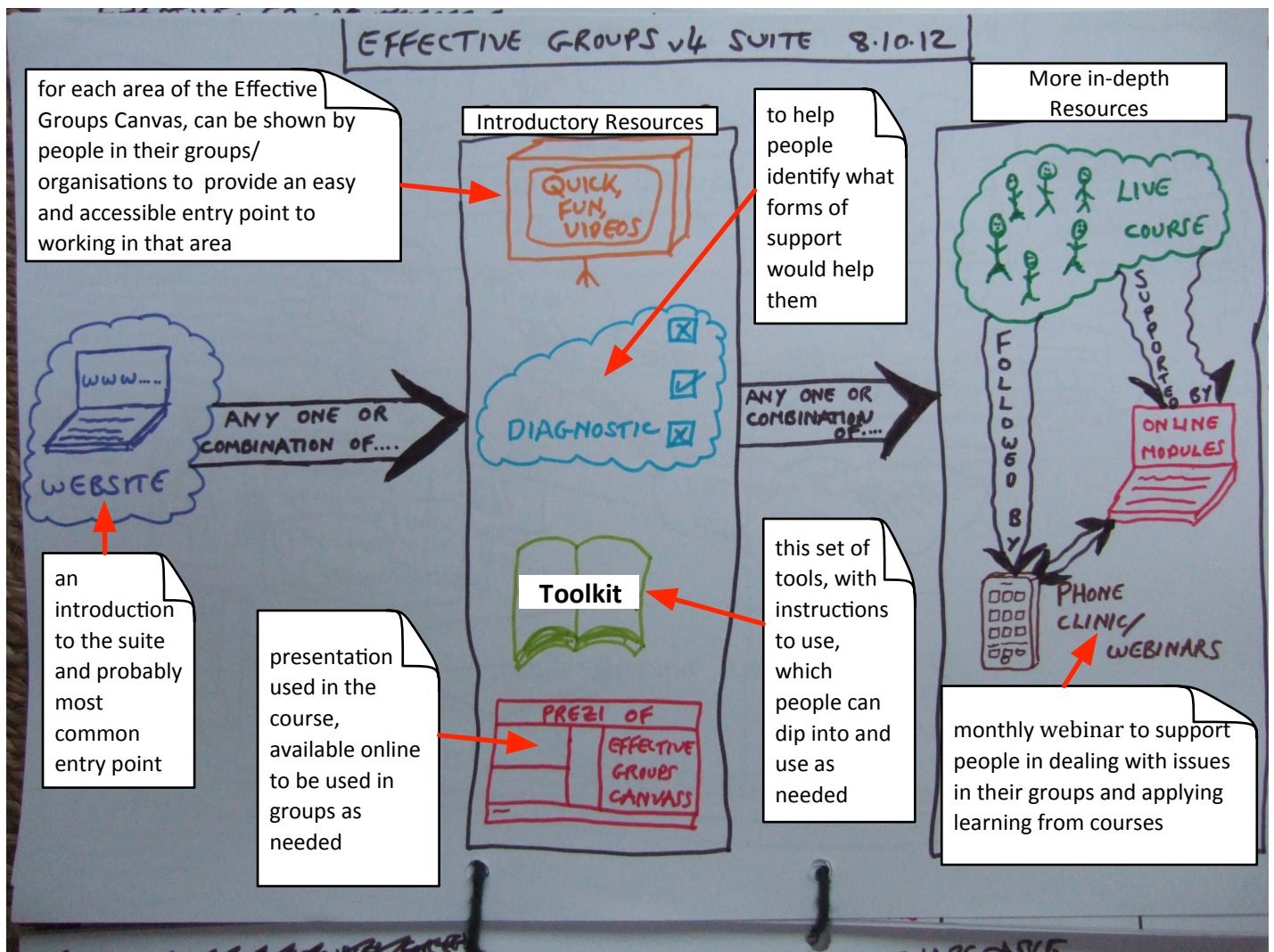


Introducing the Effective Groups Suite of Resources

Background

Until the end of 2012, 'Effective Groups' was only available as a 1 or 2-day live workshop for Transition Initiatives and other social change groups and enterprises. Through delivering the course over 3 and a half years, it became evident that there is a much greater need for support with making groups more effective than can be delivered through these courses. And also that despite there being a high level of need for this work, there are also high levels of reluctance to engage with it, and most people don't want to invest the time, energy and money in going on a course like this for 1 or 2 days.

So a project began to make a variety of resources available which are more accessible to people in Transition and other social change organisations, which can be dipped into as and when needed. The result is a the Effective Groups Suite, which is shown below.



Developing this Toolkit the Suite

In January 2013, the first draft of the toolkit was released for feedback as the first part of the suite beyond the live courses. This first draft is a skeleton of some basic content to be trialled and developed further based on feedback from people trialling it. More content will be added over time.

Plus the other parts of the suite will also be developed over time. Without funding for this it will happen slowly, so funding is being sought to speed up the development of these resources.

If you have any feedback on this toolkit, the suite or any interest in funding the development of this work, please contact Nick Osborne at nick@response-ability.org.uk.

Introducing the Effective Groups Canvas

The Effective Groups canvas, on the following page, is one way of mapping the fundamental areas which need to be attended to for a group, team or organisation to be effective, healthy and successful. Because group life is so complex, it helps to have a map of the territory. Its in the form of a canvas so that a blank canvas can be put up on a wall and then worked with to create the unique landscape of your own group and identify what needs to happen to make the group more effective. these are not arranged in an order of importance. So number 1 is not more important than 6. They are all important and if you leave out or don't do any one area well, then you will tend to be less effective as a result.

The Structure of the Effective Groups Canvas

1. it is divided into 6 key areas which are the most general and fundamental headings under which everything else can be categorised.
2. in each of the areas are a number of different topics.
3. each of the topics has at least one tool associated with it; some topics have more than one tool.
4. each area addresses some key questions
5. this toolkit follows the structure of the canvas: so the tools are organised into topics within areas- these are identified at the top of each page. More tools will be added over time.

Introducing the Six Areas of the Effective Groups Canvas

Finding Fit

So many social change groups and organisations, social enterprises and businesses fail because people are passionate about what they are doing! So passionate about what they want to do that they don't look to see what the need is for what they want to do or how they fit into their environment.

Discovering Direction

A shared sense of purpose/vision/mission/direction/values and some kind of strategy for how those can be achieved is important to help people work together. Without this in some form, its hard to make the day-to-day decisions about what to do, and easy to get into conflict with different ideas about what to do!

Creating Culture

We cannot see touch or feel culture, its invisible and intangible, but every group, team and organisation has their own unique one. Its composed of things like: unspoken agreements about 'how things work around here'; values; how well people get on; how conflicts get resolved; how power is dealt with. All of this has a massive influence on how effectively people can work together to achieve a purpose.

Governing Structure

Without **some kind** of structure or agreement about how decisions get made, its hard to work towards a shared purpose. There are many kinds of structures. This area deals with things like how authority is defined in an organisation and how decisions get made. Whether authority is concentrated in a few people are the top of a hierarchy, or shared in a group with a flat structure', or distributed among individuals. When these issues are explicit and clear, its easier for groups to be effective.

Efficient Operations

This is the area where the actual work gets done, and about which the least is said in this toolkit. The rest of the areas are about creating the conditions to enable people to work together well so that the work can be done efficiently and effectively. Because the actual operations and doing the work is so different for each organisation, this section addresses more generic issues such as: when doing work we need to run meetings effectively, solve problems, be creative etc.

Learning, Sustaining, Evolving

In a fast-changing and complex world, groups and organisations need to be able to learn and adapt. It helps to have ways to do this which are built into ways of working, otherwise this area often gets left behind... This area is also about how to sustain people's involvement so that they don't get burnt out.

Many thanks to the creators of www.businessmodelgeneration.com/canvas which has inspired this way of working.

Effective Groups Canvas- Blank Template

This is for drawing/printing out on a large sheet and sticking on the wall. Ask people to stick ideas on post-it notes about how things currently are in each of these areas in your group/organisation, and what would need to happen to improve them. Add things over time.

DISCOVERING DIRECTION

- how clear is our purpose?
- to what extent is it shared in our group?
- how do we say what we want to achieve?
- how are we going to achieve it and what values will inform how we do this?

EFFICIENT OPERATIONS

How effective are our meetings and how well can we solve problems and be creative together?

FINDING FIT

- who are our stakeholders?
- what value do we deliver to stakeholders?
- what needs are we meeting?
- what is our business model and how viable is it?

GOVERNING STRUCTURE

- what is our organisational structure?
- how do we define our roles and responsibilities?
- who has authority for what?
- how do decisions get made and how effective is the process?

LEARNING, SUSTAINING, EVOLVING

- how do we sustain people's involvement and learn as we go?
- do we have the ability to change and adapt, be agile and responsive to a changing world built into our organisation?

CREATING CULTURE

- how do we build trust and improve relationships?
- how do we improve the quality of relationships?
- what explicit rules exist about working together?
- what invisible norms exist about working together?
- how do we make conflict and differences healthy?

Effective Groups Canvas- with Topics and Tools

This shows topics for each area with some of the tools. This is not a complete list. Some tools are included in this toolkit, others will be added over time.

<p><u>DISCOVERING DIRECTION</u></p> <table border="1"> <tr> <th>Topics</th> <th>Tools</th> </tr> <tr> <td>Purpose</td> <td>Create a shared vision and mission</td> </tr> <tr> <td>Strategy</td> <td>Creating a strategy</td> </tr> </table> <p>Key Questions</p> <ul style="list-style-type: none"> • how clear is our purpose? • to what extent is it shared in our group? • how do we say what we want to achieve? • how are we going to achieve it and with what values? 		Topics	Tools	Purpose	Create a shared vision and mission	Strategy	Creating a strategy						
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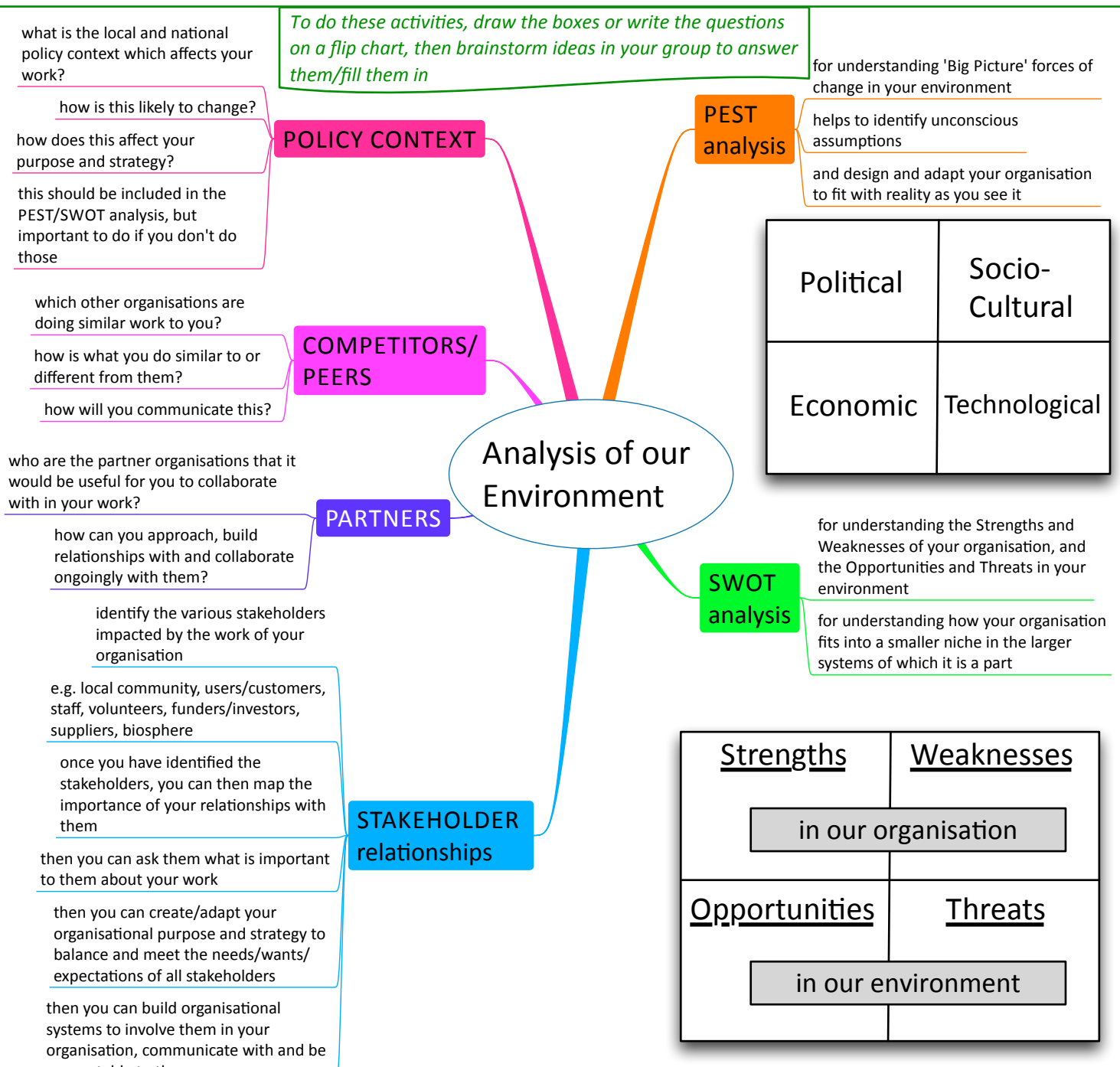
Tool: Analysis of our Environment

When its useful:

- ✓ actually, if we think about it, we haven't really got any hard evidence that there is a need for what our organisation does, we are doing it because we think its a good idea and are passionate about it
- ✓ we are struggling to get enough money/support/people... maybe this indicates there isn't a need for what we do, or that we haven't found the right place where we fit yet or that our purpose is a bit off?
- ✓ other organisations are also doing what we do, we aren't clear what is different about what we do

Just like a hedgehog can thrive much better in a hedge than on a football pitch, organisations also can 'fit' more or less well to their surrounding environment. Because so many of people in social change projects and small businesses are so passionate about what they want to do, they often neglect to invest time in finding if and what the real needs are that they can meet. Here's a range of activities to do with your group and important questions to ask which can then help define your purpose, direction, strategy, plans (in the DISCOVERING DIRECTION tools). Further information about the PEST, SWOT and Stakeholder analyses and how to do them can be found on Wikipedia www.wikipedia.org.

To do these activities, draw the boxes or write the questions on a flip chart, then brainstorm ideas in your group to answer them/fill them in



Tool: Create a shared vision & mission**When its useful:**

- ✓ there is no clear sense of direction for our group or organisation
- ✓ we are always firefighting and don't seem to make progress in any direction or to any particular goals
- ✓ we believe that we should all be involved in creating a shared purpose/vision/mission
- ✓ we don't want anyone else defining it for us

Step 1- about 15 minutes

In pairs, talk about:

1. your **Vision** for your group or organisation. If its not clear, then try answering this question: *what will the world look like if all your ambitions for this group or organisation are achieved?* Write in the Vision box on the worksheet
2. do the same with **Mission**. This is the answer to the question: *what needs to change in the world for it to look like this?* Remember to fill in the box on the worksheet
3. if there is time, start to explore your thoughts about **Strategy**. The question here is: *how are you going to make those changes happen?* (*This is really to be worked out after the vision and mission have been created*)
4. it is important that some work has been done in the FINDING FIT area, so that its more likely that people's ideas and aspirations here will have some relationship to reality and be based on evidence of what is actually needed, rather than just being about what people want

Step 2- about 20 minutes

1. pairs share their ideas
2. make a note of any parts of the vision, mission and strategy which are similar on one worksheet or piece of flip chart paper
3. make a note of any parts which are different which you think need further discussion
4. (some parts will differ and the differences will feel like they don't matter, while others will feel important and worth discussion)

Step 4- in future meetings

1. for the bits that there is general agreement about, ask for a volunteer or small group of 2-3 people to collate and write up into a vision statement, mission statement and bones of a strategy
2. suggest they do this in a separate meeting and write a draft for the group to give feedback on then redraft if necessary or agree
3. for the bits that are considered significant differences, agree a separate time to explore these, and what they mean. Maybe in the next scheduled meeting of the group. Or maybe in another special meeting. Not everyone may want to be/ needs to be involved in this conversation.
4. its important to agree ground rules before having a discussion about the differences, if you haven't done so already in this group.

Step 3- probably 20-60 minutes

1. keep repeating the above process with the joining of groups and sharing until everyone is in the same large group
2. this should result in two lists. One of points/sentences under three headings of vision, mission and strategy that there is general agreement about in the group
3. the other a list under the same headings which there are differences about which people feel the need to discuss further

Tool: Vision, Mission & Strategy Worksheet

Vision

What we want to the world to look like when we have completed our work



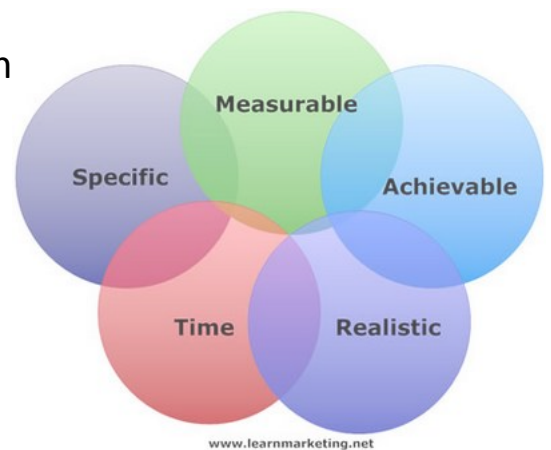
Mission/Statement of Purpose

What we will do to make the world look like this

write your statement in here

Strategy & Objectives

A plan & specific things to achieve to go into the plan



Tool: Adopt a Conflict Management Process**When its useful:**

- ✓ difficult situations don't get addressed and resolved, often leaving bad feelings or with people leaving
- ✓ unresolved tensions means we waste time going round in circles or covering old ground
- ✓ difficult interpersonal things should be aired, talked about and processed so we can learn from them
- ✓ we believe we should be able to sort things out with a process, we are just not sure how to go about it

Here's an example of a Conflict Management Process which can be adopted by a group or organisation to provide a variety of ways to help deal with conflict. There is of course much more to managing conflict effectively in a group or organisation, but this is at least a start. Below are the steps in the process. The next page is an example policy which can be formally adopted as the Conflict Management Process of a group or organisation. Take this policy to a meeting to start a conversation about how conflict gets addressed in your group or organisation, and possible ways that it could be improved.

5. if none of the above work, then external facilitation/mediation can be asked for if necessary. Maybe from another organisation working in the field where we may want to set up a mutual peer mediation arrangement with each other, or from a professional mediation service (most counties have their own mediation services which can be called on for situations like this.

4. if none of the above work then there is the option of addressing it in the group as a whole, only if both parties are in agreement to this. The group as a whole works to resolve the conflict, in relation to the purpose of the group and ground rules

3. if can't be sorted out directly, then any party can approach another member of the group to ask for help in sorting it out

2. if a conflict arises inside or outside of a meeting, then whoever is in conflict tries to sort it out with each other directly, with respect for differences and within the ground rules agreed for that group

1. if things get tense/difficult/conflictual in a meeting, any person is encouraged to suggest a 'time out'. This a break where people leave the room and reflect on what is going on, and consider how they might be contributing to any tensions. This is often helpful when done with support from someone else who can help bring other perspectives. After a short time out, say 5 minutes, people can come back together to work it out then and there, or if all parties not in agreement to do this, to agree a mutual time to do this

Tool: Example Conflict Management Policy

Name of Group/Organisation:

Date Adopting Policy:

1. being part of this group involves a commitment to attempting to resolve any conflicts which arise, not avoiding or ignoring them. Purpose of this is to keep the group healthy so that it can be effective in achieving its goals. A refusal to do this can mean that whoever refuses to do it may be asked to leave the group.
2. if things get tense/difficult/conflictual, any group member is encouraged to suggest a 'time out' a break where people step back and reflect on what is going on, and how they might be contributing. Then people can come back together to work it out then and there, and they begin by saying the ways in which they may have been contributing to things becoming tense or difficult. Or if all parties not in agreement to do this, to agree a mutual time to do this
3. if a conflict arises outside of a meeting, then whoever is in conflict tries to sort it out with each other directly, with respect for differences
4. if can't sort it out directly then approach another member of the group to ask for help
5. if that doesn't work then there is the option of bringing it to the group as a whole, only if both parties are in agreement to this. The group as a whole works to resolve the conflict, in relation to the purpose of the group and ground rules
6. external facilitation/mediation can be asked for if necessary, maybe from another organisation working in the field

Tool: Accelerate your Decision-Making

When its useful:

- ✓ most of our decisions seem to need to be discussed by everyone in the group
- ✓ this take a long time, feels unnecessary and sometimes I lose the will to live
- ✓ there is no clear process for how decisions are made in the group, its all fuzzy and a bit confusing
- ✓ I would like a quicker and more effective way to make decisions

Group Activity

This activity is best done with your whole group before or at the start of a meeting so that everyone in the group can get used to the process of working out which method of making a decision works for which kinds of decisions. It should take between 30 and 60 minutes.

1. Prepare the room

- a. write 1 of each of the 7 methods of making decisions on each of 7 pieces of A5 paper (on next page)
- b. clear the room so there is a big space in the middle
- c. lay out the 7 bits of paper with the 7 methods of making decisions on the floor diagonally across the room in the same order as in the diagram on next page, with 'Authority without discussion' at one end, and 'Consensus' at the other

2. Prepare the decisions

- a. create an agenda for a typical meeting. Best to use an agenda for a real meeting you are due to have
- b. for each item on the agenda, work out if it is for information and/or discussion and/or decision
- c. for each item which requires a decision to be made, write down a short label for that decision on a piece of paper so that everyone knows what that decision refers to, about A5 (half A4 size) is good

3. Figure out which method to use for which decision

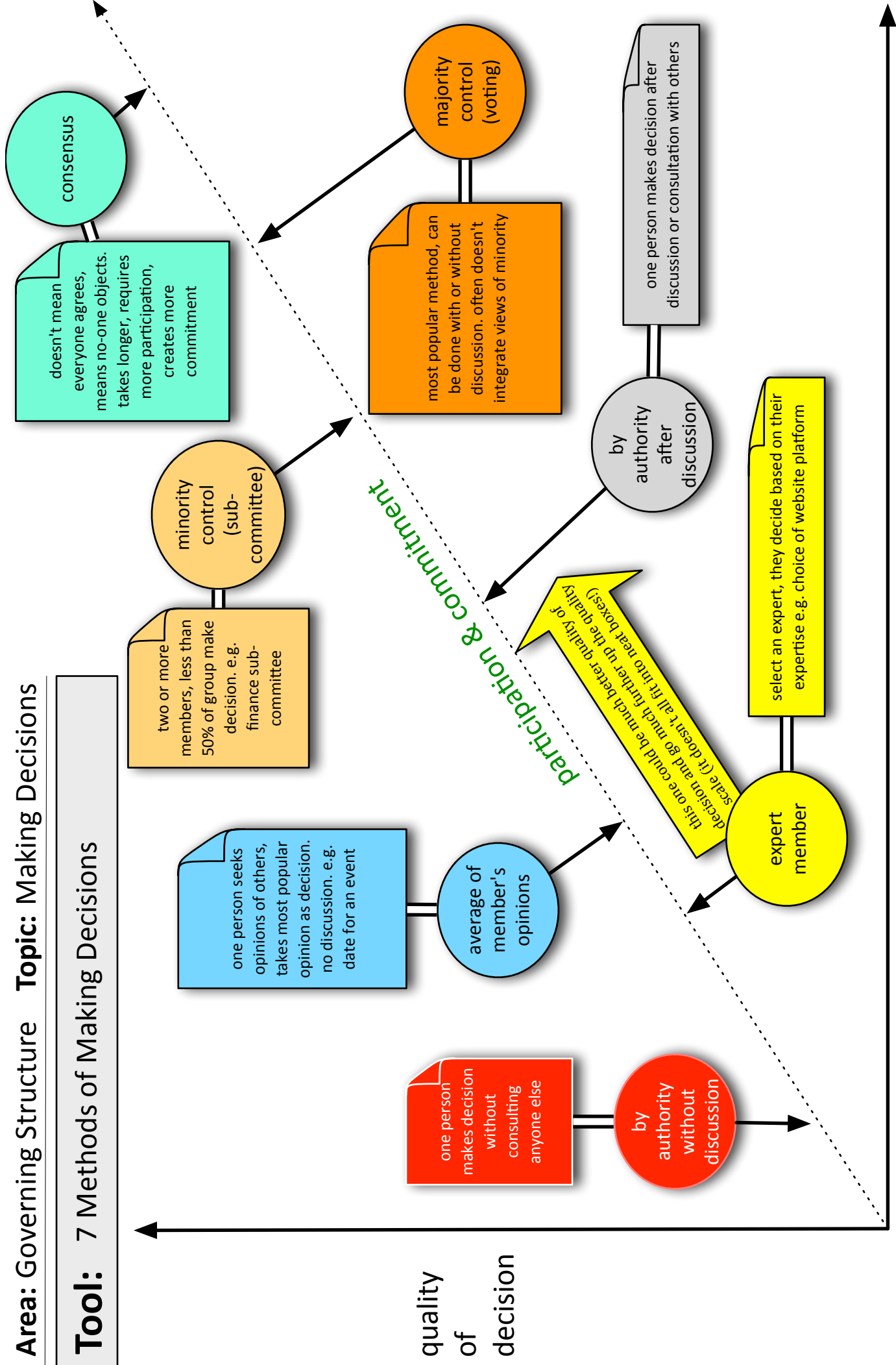
- a. look at the decisions which need to be made one by one. Consider which method of making a decision should be used for each decision that needs to be made. Place each decision next to the method that would be used to make it

4. Reflect on the process

- a. once you have placed all the bits of paper on the floor, stop to reflect on what it looks like. Explore the following questions: Is there a pattern? Are there clusters? What does the spread say about your group? Were there items that had significant disagreement/debate about them? If so, what were the issues? What was the process of making the decisions for which piece of paper went where? So what? Have lots of discussion while you do it.

The discussion will help your group establish your norms for how this is done in future, so that you won't need to do this process each time. This exercise probably only needs to be done once or a few times in a group before it will just seem pretty obvious which method to use for which kind of decision. The key learning from this activity and benefit of using this tool is that bringing an item to a meeting for a group discussion is a very big deal because it requires the most input from everyone and takes so much time. It should be considered the **ABSOLUTE LAST RESORT!** If there are any other ways to deal with any issues, try and use them first.

Tool: 7 Methods of Making Decisions



length of time required

Tool: Effective Participatory Meetings**When its useful:**

- ✓ our meetings are any one or mixture of long/boring/frustrating/ineffective/make me lose the will to live
- ✓ our meetings are full of unspoken assumptions about things like everyone needing to be heard and included, everything needs group discussion and agreement, power, leadership, conflict are bad
- ✓ I would like our meetings to invite people's participation, support collaboration while also being effective

Checklist for Effective Meetings

- ✓ we have discussed our personal assumptions with each other about how much participation there should be in group decisions and reached agreement about it. For example, whether all things need to be discussed by everyone and we all need to agree on everything, or we vote, or distribute authority...
- ✓ we share different roles in our meetings for facilitator, minute-taker, timekeeper, doorkeeper to settle in latecomers and temperature-taker (who looks for any emotions disrupting flow of the meeting and suggests things to do with them, like taking a short break if things get tense, taking deep breaths etc.)
- ✓ we have a clear agenda. Maybe created prior to meeting on the template on the next page, or maybe we create the agenda at the start of our meeting
- ✓ we have a clear process for making decisions (if not, see the tool Accelerate your Decision-Making)
- ✓ there is a clear and obvious way for knowing when a decision has actually been made, this decision is recorded in the minutes and read back to confirm before moving on
- ✓ minutes of the meeting clearly record decisions taken and which actions are going to be taken by whom
- ✓ we use hand signals in our meetings to make things which are invisible more visible
- ✓ there is a clear, simple, agreed set of ground rules or group agreements which create shared understanding for behaviours which are un/acceptable and are used to help meetings be more effective
- ✓ we have people in our group who are skilled in facilitation to help our meetings be more participatory and collaborative and run smoothly, or if not we have plans to increase the facilitation skills in our group
- ✓ we understand that simple practices for making meetings more effective are only a part of the picture. And that there are many other pieces of the puzzle which need to be in place for meetings to be truly effective, enjoyable and be a key part of making our organisation more successful.

Activity to Create an Effective Meeting**1. List Agenda Items**

Make a list of all items to go on your next meeting agenda

2. Add items onto Agenda Template

- decide which order to go in to give a sense of flow to the meeting
- decide if each item is for information/discussion/decision
- if decision, how will that decision be made (see Accelerate your Decision Making)
- note name of sponsor
- allocate time for item

3. Try it Out

See how a meeting goes using this method.
Renegotiate times for items if it looks like an item will take longer than allocated time, before the time runs out for that item

4. Evaluate the Meeting

Reflect on what went well, not so well, what could be better next time, what did you learn about running meetings effectively?

Tool: Map of an Effective Participatory Meeting Agenda

some Quaker meeting practices suggest an item should come to a meeting at least 3 times before a decision is made: once for information only, then for discussion, and the third time for decision. this is an ideal, since today's fast-paced world often requires decisions to be made quicker than this

whether an item is for information, discussion or decision will affect how people think about it and work with it in the meeting. so contributions can be more focussed

allocating a time per item helps ensure they all get attention. if you go over time on one item, then renegotiate times for others then, or agree to defer some items to another meeting. this is better than just running out of time and not getting to some

item	name of sponsor	type of item: information/ discussion/ decision	time /mins
open			
start with something positive- check-in & appreciations- go round			10
minutes from last meeting- matters arising & approval			10
<i>quick & easy item to start with feelgood factor</i>		information	5
<i>medium length</i>		decision	10
<i>meaty longer item</i>		discussion	25
announcements & grumbles			5
break			10
<i>meaty longer item</i>		decision	30
<i>meaty longer item</i>		information/discussion/decision	30
<i>quick & easy item to end with feelgood factor</i>		discussion	5
close			
next meeting- date, who is facilitator & taking minutes			5
close & evaluation			5
total time			150

starting with something positive helps to create a good atmosphere at the start

have a name next to each agenda item for the person who has put it on the agenda and will introduce it

have a short section for announcements just before the break. no discussion- this can be during the break.

grumbles are an invaluable conflict prevention tool! time for people to say what is irritating them before it gets too big to deal with

a short slot to evaluate it will help develop shared learning about how to run meetings more effectively in future

close so people know its finished, rather than all just drifting off. this can prevent loose ends left hanging and provide a sense of completion

put the items in an order to create a flow to the meeting:

- start with a quick and easy item to create a sense of momentum and feeling like things are moving
- deal with a meaty longer items in the middle
- end with another quick and easy one to finish with a sense of achievement.

it may seem trivial, but makes a difference to how a meeting feels!

2 and a half hours

Tool: Template for an Effective Participatory Meeting Agenda

item	name of sponsor	TYPE OF ITEM: Is it for Information/ Discussion/ Decision	time /mins
open			
start with positive- check-in & appreciations- go round			10
minutes from last meeting- matters arising & approval			10
Items			
quick & easy item to start with feelgood factor			
meaty longer item			
announcements			
break			
meaty longer item			5
meaty longer item			10
meaty longer item			
quick & easy item to end with feelgood factor			
close			
next meeting- date, who is facilitator & taking minutes			5
close & evaluation			5

Tool: Create ideas to sustain involvement

When its useful:

- ✓ people keep getting burnt-out
- ✓ we need more people to join, contribute to and stay in our group/organisation
- ✓ there are no clear ways for people to join, get introduced to what we do or start to be involved
- ✓ we don't celebrate our achievements or have enough fun

Group Activity

This activity is best done with your whole group present. Start with one person briefly introducing the topic to the rest of the group, saying why the issue of sustaining involvement is important for the group and what the different areas of it are about (below).

- ask people which of the 3 areas they feel most interested in or drawn to working with for this activity
- split into 3 groups, each with a large piece of paper (flip chart if possible) and coloured pens
- for up to 30 minutes, each group to brainstorm ideas, discuss and answer the questions, if useful, and record their answers

Welcoming

People want to join and stay in groups which make them feel welcomed and valued and where they can easily find their place and contribute.

1. is there a clear process for new people to join the group?
2. what can we do to help people feel welcome in our group when they join?
3. what information would be helpful for them to know about us, and us about them?
4. how do we help people find their 'fit'- the best ways they can contribute to the group?
5. what are the invisible things we take for granted in this group that someone coming in might not know or see?

Sustaining

People want to stay in groups where they get what they want from them. That could be any one or mixture of achievements, fun, learning, socialising etc..

1. what can we do to make it more likely for people to want to stay in this group?
2. how do we publicise and celebrate our achievements?
3. how do we support the balance between what people give to and receive from the group?
4. how do we spend more time building relationships and glue so we can work better together?
5. how do we support people in learning from their involvement?
6. how do we make things more fun?

Endings

Much of a group's reputation depends how people leave. Do you celebrate people's contributions when they leave? Do you have a fair and clear process to ask someone to leave?

1. how do we acknowledge and celebrate people's achievements and contributions to the group when they choose to leave?
2. how does someone's departure get communicated to the rest of the group?
3. what is the process for respectfully asking someone to leave the group if necessary, for example if their behaviour is disruptive and they repeatedly break group agreements?
4. how do we capture the learning from people who are leaving about how we can improve our group?

- each group to share with the rest what they talked about and their ideas
- 1 person to record any follow up actions to make any of the ideas happen
- reflect as a whole group what this exercise says about how the group currently is around these issues and how much that contributes to or hinders sustaining involvement