Engagement Practices

TAKING STOCK – PRE-MEETING ASSESSMENTS

Description

A pre-meeting assessment helps reveal issues and concerns in advance. It also gives organizers and participants an opportunity to air concerns so they can be more productive during the meeting. A thorough assessment before the meeting helps the facilitator design an effective process that addresses the needs of the participants.

Process

The facilitator should plan and conduct the assessment, seeking information primarily from the meeting leaders. It can also be helpful to obtain clarifying data from a sample of the meeting participants and other available sources. The publication *Introduction to Stakeholder Participation* can help you better understand those participating in the process. The assessment typically includes three phases of activities: planning, collecting, and analyzing.

Steps

You may not always be able to do a detailed, thorough assessment as outlined in the steps below. Nevertheless, some level of assessment is always helpful. Given available resources, do what you can to learn about the needs of the audience before planning your meeting.

Plan the assessment:

1. **Talk with the meeting leaders**. Identify the overall goal of the meeting and desired outcomes. Understand any group dynamics or underlying issues to be aware of.
2. **Gather existing information**. Look at process agendas and notes from previous meetings of this same group of participants, or of meetings with a similar goal. While reviewing this information, look for key data to inform the meeting design, including
    - Participants (roles, responsibilities, characteristics)
    - Probable issues (risks)
    - Process (established agenda items/parameters, including activities and timing)
3. **Characterize the participants**. Given the information from Step 2, what do you already know about them? How well do they know each other? Have they met before? How did those meetings go? What is their experience with highly facilitated meetings?

Are they experts in the meeting topics? What perspectives have they shared in the past? Have they experienced conflict in previous meetings? Are there personalities that would be helpful to know about ahead of time so you can have individual conversations with them? Are there strongly held beliefs that might get in the way of a productive meeting?

4. **Identify the data you still need to design the meeting**. What is it that you still do not know about the participants and the issues to be discussed? What can you still learn about the history of this group, the political landscape, and priority issues?
5. **Develop a plan to collect more information**. What methods will you use to collect the information (individual conversations, focus groups, surveys)? Identify whom to speak with and questions to ask. Get help from those who understand the background and dynamics of the group you will be working with.

Collect Data:

1. **Collect and record data.** Gather information by interviewing (individually) a representative sample of your participants or by guiding a discussion with a small group of participants. Be clear about how you will share the data you collect, if at all. This will help to establish trust between you and the participants. This can be either annotated transcripts or scrubbed summaries of the discussion. Be clear on format before the conversations.

Analyze:

1. **Evaluate** the results of your data collection. Summarize big points suitable for sharing with the group and used to make process decisions.
2. **Get a reality check.** Talk with facilitator-peers about the needs you have identified. Ask how they have designed meetings, given similar meeting goals, desired objectives, and participant needs.

Tips

- Consider including meeting participants in your assessment.
- The individual conversations can sometimes be very candid and that can help with getting a few things aired before the meeting itself. Sometimes folks just need to vent. Allow them the space to do that, ensuring confidentiality of information but recognizing that airing concerns might be part of what the group needs.
- Have a moderator and a note taker for the conversations so there can be active listening and accurate capture of comments.

Benefits

- The benefits of a pre-meeting assessment occur when there is a history of unresolved conflict among the participants.

- The approach can be useful for tailoring an agenda when you have a "new group" that does not have a history of interacting with each other and where shared goals may not be clear.

Considerations

Requires time to plan for, collect, compile, evaluate, and share data.

Materials Needed

- Time: dependent upon the length and complexity of the meeting, but could range from a few hours to multiple days.
- Note-taking process and materials: shared documents and templates are helpful to set up ahead of time.

References

- Nir, M. (2013). *Building Highly Effective Teams: How to Transform Teams Into Exceptionally Cohesive Professional Networks: A Practical Guide.* San Bernardino, CA: CreateSpace Independent Publishing Platform.
- "How to Create and Facilitate Meetings That Matter" at *bridgepointeffect.com/wp-content/uploads/2012/12/2007-NOV_IM-Journal_Francisco_Mindful_Meetings.pdf*.
- "Introduction to Stakeholder Participation" at *coast.noaa.gov/digitalcoast/training/stakeholder.html*.

- Sample interview questions
    - *What should I know in order to facilitate a productive meeting for you?*
    - *What are the biggest challenges with people or processes for your group to work better together?*
    - *What other thoughts, goals, hopes, or fears would you like to share about your team undertaking this effort?*
    - *What ideas do you have for how your team could be more effective, including anything you could do to contribute to its effectiveness?*
    - *What has helped your team make progress, especially during previous meetings?*