27 Ways To Improve Your Meeting

1. Check people's time commitments before you begin your meeting

This is an important thing to do, especially when you have a diverse group of people throughout the organization attending a meeting or you have a combination of insiders and outsiders attending your meeting (e.g. customers, community members, vendors).

Doing this helps with two things:

A. It alerts you to who will be leaving before the official time of the meeting. You might have to adjust your agenda to make sure someone who has to leave early is utilized appropriately. For example: there might be a specific agenda item that an "early leaver" is an expert about and you want to use their expertise. Just let participants know what you are thinking.

"Mary has to leave at 1:30 and I would like to suggest we move the agenda item on the technology infrastructure up so we can get her advice before she has to leave. Is that okay with folks?" Get approval and keep on moving.

B. Whenever a person leaves a meeting, it changes the group dynamics. It can either add or detract the energy and focus of the meeting. For example: If a senior level person leaves early, participants might psychologically relax when they leave or feel like the meeting is less important after the leader leaves. You need to be prepared for both scenarios and remind participants that they still have important work to do and that you expect full participation

2. Skip Monday morning meetings – they are usually not a good idea

About 80% of the organizations we have worked with have Monday morning meetings to "kick off" the week. This is especially true at the senior level. This idea looks good on paper but is often detrimental in practice.

We suggest you have a Monday afternoon "kick off" meeting or wait until Tuesday morning. Some reasons why:

A. While attending a Monday morning meeting, people psychologically are thinking about their staff, wonder what's going on in their department/division, still thinking about the weekend, worry about the problems that await them.

Let people have Monday morning to check in with their people, problem solve and get things moving in their units. This way when they come to the Monday afternoon meeting, they will be psychologically connected to what's going on.

B. It gives people extra time to prepare for the "kick off" meeting. They can review the necessary information before they come to the meeting and do some thinking so they are prepared for the meeting.

C. There will be less stress about the meeting because the sense of urgency that accompanies the usual Monday morning meeting will be neutralized.

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3. Ground rules are essential

For any regular meeting it is important to have some “working agreements” or “ground rules” to which participants are committed. Make sure there is agreement on the ground rules before beginning the meeting.

Some suggestions:

Our favorite is “one person speaks at a time”. This helps eliminate all the aggravating sidebars that take place in most meetings and take the energy and focus away from the discussion. If you see more than one person talking during a meeting, gently remind people of the ground rule. Don’t single anyone out (e.g. Pat, can you stop talking while Barbara is explaining the new budget?). Just state the ground rule as a reminder to everyone. Do it as soon as it occurs so you nip it in the bud and, especially if someone senior is the guilty party. If participants see the facilitator let the senior leader violate the ground rule, you don’t have a ground rule any more.

Another effective ground rule is “start and end on time”. This helps communicate that everyone’s time is valuable and gives the meeting facilitator/leader permission to begin the meeting on time, even if someone is missing. It also holds the leader/facilitator accountable for ending on time, so be careful what you wish for!

Use whatever ground rules you believe will help you have an effective meeting. Pay attention to both task (e.g., start and end on time, distribute agenda before meeting) and the process (e.g., practice active listening, one person talks at a time) elements of meetings.

The key thing to remember is that meeting participants need to agree with the ground rules before you begin the meeting. It is hard to impose ground rules after the meeting begins (why don’t we now agree to raise our hands and be acknowledged by the facilitator) halfway into the meeting.

4. Poker chips and paper clips

This is a technique we have used several times and is very effective with highly verbal, dominating or contentious meeting participants.

Before the meeting, distribute 5-10 poker chips or paper clips to everyone. Communicate the following to participants, “Every time you speak, please put one of your poker chips in the center of the table. For every 3 minutes you speak, it will cost you another poker chip. (This prevents one person from monopolizing the conversation). After all your poker chips are spent, you can no longer verbally participate on the meeting, just listen to others and observe.

Obviously, this technique will not work if people don’t agree with it. It will take the senior leader to sanction the technique. They must be willing to give legitimacy to trying this powerful technique.

When utilizing this technique, several things will happen:

A. The overly verbal participants will spend their poker chips quickly

B. Sometimes the “verbals” will actually think before they speak because their participation costs them something and;

C. The quieter participants will have most of the chips and begin participating more.

You want this to happen.

5. Use a timer

This is a technique that can work very well but must be used judiciously. The goal should be to make people aware of time, not create a false sense of urgency during the meeting. For example, let's say there is an allotted 30 minutes for discussion on a specific topic. Set the timer to go off in 15 minutes. This "half time" reminder will let people know how much time is left and usually focuses participant's attention quickly.

Kitchen timers are great because they have a clear signal when they go off.

6. To lead or facilitate?

We often get asked this question by leaders, "should I facilitate the meeting or be a participant in my meeting?" We have found that trying to be the leader and the facilitator is fraught with danger (well, maybe not danger but it's not a good idea.)

Leaders often have a vested interest in the decisions that will be made during a meeting. Facilitators should never have an interest in what the final decision will be. Their role is to move the group towards a good decision and be neutral.

Often, a leader cannot be neutral about where a decision is going. Everyone knows this and will wait until the leader signals what they believe the decision should be.

We suggest the leader appoint or assign someone to be the facilitator who has no skin in the game and participate as the leader.

7. Watch out for two signals that your meeting is in trouble!

Often, when there is an important or hot topic being discussed in a meeting, participants will start talking fast and furiously. As a facilitator, you need to pay attention to two things:

Interruptions where more than one person is talking and people are talking over each other. It is a sign that the communication process has broken down. Participants cannot pay attention to two conversations, even if they think they can.

As the facilitator of the meeting, all you have to do is bring to conscious attention the fact that people are interrupting each other and things will almost always quiet down. For example: "I notice that we have more than one person talking at a time" will suffice.

Volume: When you notice that people are talking louder during a meeting, it is important to gently intervene. When people talk louder, it usually means they don't feel heard. Once again just state what you see, "I notice that some of us are speaking more loudly". Just state this without judgment and it will bring it to participant's attention and usually quiet things down.

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8. One minute of silence

This is a great technique to use when things are moving too fast or the group has run out of ideas. Just suggest that participants take one minute to think about what is being discussed silently.

This will either slow things down when they are moving too fast. With a group that has run out of ideas, it can create the psychological space to generate new ideas and spark a creative discussion.

It can also be a useful technique when a group is experiencing some conflict or tempers are rising. One minute of silence can create the space for something new to evolve (e.g. more insight, empathy, cooling down).

9. Confirm, confirm, confirm

We have found that somewhere between 20-30% of meetings are cancelled or postponed. It is always a good idea to have a “rain date” for a meeting, this way you have a fall back position.

Make sure to double check and confirm the time and place for a meeting you will be attending so that you don’t waste your time traveling to a meeting that was cancelled the day before.

10. Start with the most important agenda item first

Many of us have gotten into the habit of covering trivial items at the beginning of our meetings.

There are two primary reasons for this:

It allows the latecomers to miss the “little stuff” and be there when the real meeting occurs. This also encourages lateness because people think, “heck, the first 10 minutes aren’t important anyway”.

It is “supposed” to create some “positive momentum”. The thinking behind this is if we knock off a few items early in the meetings, people will feel like they have accomplished something. This is not true.

Starting with the most important agenda item first does several things:

A. It conveys respect for those participants who arrived on time

B. It discourages the latecomers from coming late because juicy stuff happens early

C. You use your meeting time more effectively and strategically because the priority stuff if dealt with early when people are more alert. In the second half of a meeting, people can feel rushed, or have “checked out” because they are thinking about the next meeting they have to attend.

11. The 1/3 – 1/3 – 1/3 Rule

Because of their learning style, many people like to receive pertinent meeting information before the meeting. Theoretically, they want to read the information ahead of time so they can come prepared to the meeting. Though this is a wonderful intention, the meeting facilitator or leader should expect:

1/3 of the meeting participants will actually read the material carefully; 1/3 will misplace or say they never received the material; 1/3 will be reading the material on the way to the meeting!

The reason we bring this up: do not assume everyone is fully prepared for your meeting. Instead, have a general discussion about the important elements in the meeting materials, highlight these, capture them on a whiteboard or a flipchart and continue the meeting.

This way everyone is on board and no one has to admit they didn't have a chance to read the information prior to the meeting.

12. Round tables are usually best

Whenever possible use round tables for your meetings. They help encourage dialogue and discussion and convey the feeling that we are all on the same level. There are not "power" positions with round tables; whereas, with rectangular tables the ends of the table are where the "power" people sit.

13. With intense meetings use the right layout

Although we usually like round tables for our meetings so everyone can easily see each other, there are times when it is not a good idea.

When there is an intense conflict about a topic, strong disagreement about a decision being made or when certain people have problems with each other, it is more effective to have the group sit in a semi-circle facing a whiteboard or flipcharts rather than face each other.

This way the intensity can be managed by the facilitator and directed to the task at hand. Facing the wall and not each other, diffuses the energy dramatically.

14. Get rid of extra chairs

If you are facilitating a meeting for 12 people and there are 20 chairs in the room, get rid of the empty chairs if you can. Put them in a hallway, stack them up or put them in the back of the room.

Empty chairs are distracting, people sometimes wonder who is missing from the meeting or who "should" be attending. Unconsciously it conveys that the meeting can't be that important because the room is not filled.

15. The "strategic" use of time

It is helpful to start your meetings on the quarter or half hour (e.g. 11:15, 12:30, 1:45). It encourages punctuality. Avoid the hour (11:00, 3:00) starting time because if people come at 11:07, they can feel like they are "almost on time".

A. Most people are not very good at the allotment of time for agenda items. They "guesstimate" and are usually wrong. Remember, Analytics and Practicals love short meetings. They will often allot 5 or 10 minutes for an agenda item that needs much more time. This is not a criticism, simply a factor to consider.

B. For important agenda items, add an additional 15 minutes to your original estimate. That way if things are going well, you have some wiggle room. If you finish early, you will look like a genius.

C. People can only pay attention for about 45 minutes and that's if they are interested in the topic! It is a good idea to take short (5 minute) stretch breaks every hour or so. This will allow people to take care of themselves, create more energy and even spark some creative ideas when people return.

Make sure you communicate the time limit before you take the stretch break. Get agreement on how long the "stretch" break should be (never more than 10 minutes).

It is helpful to remind people that if the stretch breaks take longer, the overall meeting will be longer.

16. "Working" lunches = a bad idea

We don't like working lunches but highly task orientated people seem to love them. They assume they can "kill 2 birds with one stone" by eating and working through lunch. It is rarely a good idea.

A working lunch is usually an indication that the agenda was way too ambitious or the discussions way too long. It can get real ugly when people are talking and chewing, waving a sandwich for emphasis, spilling their drinks, dribbling, and wiping their mouths.

Give people 20 minutes to eat their food in a civilized manner. Then get back to the meeting. Have the food delivered in the room so that people stay there. If they have to go someplace else for lunch, they will migrate all over the place.

17. We hate latecomers!

We realize when people come late to meetings they often have legitimate excuses/reasons (e.g. stuck in traffic, train delayed, boss called a meeting at the last minute).

Too often, we all suffer from perpetual latecomers. The following are some suggestions:

A. Make sure you arrange the room so latecomers can enter from the back of the room and slip in quietly

B. Make sure you have an agenda and all appropriate materials for them so they don't fumble around and ask for help

C. Try mightily not to review all that has been accomplished so far in the meeting. That's what minutes are for. Obviously, if the boss comes late, it would be smart to get them up to speed. But, avoid it if you can.

D. With important meetings, some organizations have a "gatekeeper" whose job is to bridge latecomers into the meeting. Offline or out of the room, they review what has taken place so far and where the group is currently. They do this quietly.

E. Lastly, and this is a little sneaky but fun. You can establish a protocol that latecomers (not the legitimate ones) take the meeting minutes. You will be amazed how motivating this can be.

18. Switch seats periodically

In a long meeting (••• – 1 day) encourage participants to switch where they sit once or twice in the meeting. This should occur after a break or after lunch. This helps to create more energy in the group, give people a different perspective as well as make sure the same people are not sitting together all day.

19. Get stuck. . . move on and come back

During a meeting, if your group gets "stuck" on a particular agenda item, suggest moving ahead to the next agenda item. Let participants know that you will return to the difficult item (this is essential) after you have finished the next one.

Doing this gives participants a psychological break, shifts their thinking and may create the opportunity to gain insight and perspective about the challenging issue. It can also create the positive momentum to tackle the difficult item after successfully accomplishing the easier one.

20. State the agenda items as questions

This is a traditional technique that works quite well. Instead of listing the items on the agenda as topics (e.g. onboarding, organizational morale, core process problems), state them as questions. For example: "How can we further improve our organization's climate?" "How can we create the best onboarding process for our incoming interns?" "What about our core process is working and what is not?"

Stating the agenda items as questions can stimulate thinking and creativity because most of us like the challenge of a question and will want to answer it!

21. Natural endings

When you schedule an ongoing meeting (e.g. a group that meets weekly), it is helpful to hold your meetings about an hour before lunch time or an hour before the end of the day. People will get hungry and want to move things forward or want to get home. Natural endings can be great motivators for staying on track and on time.

22. Review where you have been and where you are going

If you are participating in a group that has a series of meetings over time (e.g., task force, committee), it is helpful to review where you have been as a group. For example: "The last time we were together we read the organizational climate survey, brainstormed some ideas and prioritized the best ones. Today we are going to create action plans to move the best ideas forward and provide feedback for each other about our action plans. The goal at the end of the meeting is to have four operational plans that will be implemented over the next three months."

23. Make time for advocacy

Before an important decision is to be made in a meeting, create the opportunity for each participant to state their position and the thinking behind their position. Don't allow any debate or questions. Each person has 1-2 minutes to say what they need to say. After the "advocacy" round, have participants vote anonymously on the best decision. This way, no one can unduly influence others in the final decision.

24. Three techniques that encourage participation

1. Do a think/pair/share:

The meeting leader/facilitator asks the group a focus question regarding the agenda item (e.g. "How can we have a reward and recognition program that doesn't cost more money?" or "What can we do to improve customer service?")

Ask each meeting participant to think of some strategies and ideas and write them down on a piece of paper. Give them two minutes to do this. Then ask them to pair up with the person sitting next to them and share their ideas. Give them 2-3 minutes for this. Then ask the participants to share their best ideas with the entire group.

The meeting facilitator should take one idea from each group, write it in full view of everyone on a flipchart and go around as many times as necessary. The reason you take one idea from each pair is that you want everyone to feel like they have added something of value to the conversation. If you have 6 "pairs" in a meeting and take all the ideas from the first and second pair, there is a good chance the other pairs will not have anything to contribute because the first two groups will have shared all the good ideas. You want to avoid this.

2. Index cards:

With this technique, the meeting facilitator would hand out several index cards to each meeting participant. Again they would ask the group a relevant focus question and ask them to write their answers on the available index cards. Let them know there are plenty more index cards if they need them and that legibility is important. Also, no names should be attached to an index card.

Give them about five minutes to write down their answers and have them hand them into the meeting facilitator. The facilitator then writes down the suggestions on a flipchart. You might want to ask someone to help you write the ideas down so the meeting moves quickly.

After the list of ideas are written, the group can review each one and discuss them. If you are trying to reach a decision about the suggested ideas, you can use the Las Vegas Voting or the Nominal Group Technique in the Toolbox section.

Using index cards does several things:

1) It neutralizes the most verbal participants. Instead of blabbing away off the top of their heads, they have to slow down and think about the question or problem. You will find the suggestions will be more thoughtful and considered using this technique.

2) It involves the quieter or more shy meeting participants. Those individuals who might be reluctant to participate verbally will feel much more comfortable writing their ideas down.

3) it also neutralizes power or bias in the meeting discussion. When people don't know

who said what, each idea rises and falls on its own merit. If everyone knows what ideas the leader is proposing, it is easy to agree how "brilliant" they are.

A very simple technique with lots of benefits.

3. Round Robin: This is a class participation technique that has been around for years. It is very simple but gets people talking. Once again, the meeting facilitator would ask a focus question and then go around the room and solicit ideas from each participant. You go "around the room" and hear from everyone. If a participant wants to "pass", that's okay but make sure you double back and check and see if they have anything else to offer.

This technique creates a sense of gentle structure, neutralizes the overly verbal participants, communicates that we want to hear from everyone. All nice things.

25. Review group agreements before people leave

One of the things that drives people crazy and promotes ineffective meetings is poor wrap-up at the end of the meeting. You can have an exciting, energizing, productive meeting and blow it all away in the last 10-15 minutes of the meeting.

You have to be very disciplined about summarizing the decisions made and next steps before the end of the meeting. Two things to remember: 1) people will tend to resist this because it holds them accountable and psychologically they are already out the door and, 2) you have to build in time in the agenda to do this or it won't happen. If you have a one hour meeting, you need to take the last 10 minutes to clarity what has been agreed to, responsible next steps and whose accountable, specific assignments, etc. In a two hour meeting, reserve 15 minutes. In a three hour meeting, reserve 20 minutes. In a day long meeting, take the last 20-30 minutes.

During this time you also need to review any issues that are in the Parking Lot and not solve them but find a time, place and process for them (please see Parking Lot in the Toolbox section).

If you build in review time, several things will happen: 1) people will feel some psychological closure about the meeting and not leave feeling there are a lot of loose ends and, 2) you communicate that we are action orientated and hold people accountable.

26. "Rabbit Holes" and "Moonshots"

Before you start an important meeting where you know that 1) you have talkative participants or, 2) there is a difference of opinion or, 3) you have some people who love to hear themselves talk (don't you just love those guys?), or 4) folks that like to "theorize" and love an exchange of ideas. You get the idea.

Try to get the group to agree that they need to look out for "rabbit holes" and "moonshots". This will get their attention. Explain that "rabbit holes" occur when group members get bogged down in an inappropriate level of detail. The level of detail that does not help but hinders the group's decision or process. The reality is that most people .

Know exactly what a rabbit hole looks and sounds like. It is debilitating and they don't know what to do about it.

Getting people's agreement upfront that "we" all have to watch out for rabbit holes is the best way to prevent them. Every participant can ask, "Are we in a rabbit hole right now?" or "It feels like we are going down a rabbit hole".

A "moonshot" is the opposite of a rabbit hole but just as deadly. That's when a participant wanders off and takes the conversation "to the moon". Often, they will signal this by actually saying, "I don't want to go off on a tangent but. . . " You must intervene right there before they take off! Gently, remind them about the topic at hand and try to redirect their conversation to the actual discussion. If you find you are already in a moonshot (it happens quickly!), you can ask the "astronaut" a question: "Rod, could you help me understand how what you are saying is connected to what we are talking about currently?" Do not use sarcasm because it will only fuel the spaceship (e.g., "Well Bob, if you only understood the complexities of this topic, you would clearly understand the connection.") And off they go!

You can also suggest that we "park" their idea in the Parking Lot (see Toolbox section) or Grasscatcher and keep things moving. Once again, convey respect at all times or you can create a situation that is hard to get out of.

(We have one client who actually has cut outs of a rabbit and a moon. They use them to quietly signal to others in the group where they think the conversation is going. They have used this technique for several years and it has helped make their senior management meetings more effective.)

27. For the truly courageous!

The following are two rather dramatic but very effective group management techniques. We worked with a team of eight executives who made an agreement that cut down long-winded conversations. Their "ground rule" or agreement was: if two members of the group hold up a red card, the person talking had to stop. They believed that if two members believed that the discussion was wandering or off track, it was enough to pause and check things out.

It might be noted that this group has very positive group culture so the cards were not used to antagonize each other or stop debate. The cards signaled to the group that at least two members thought the discussion should come to an end.

Another group we worked with had a verbal "weed whacker" signal to indicate that the conversation was going "into the weeds". Either too much detail or tangential thinking could trigger someone in the group to gently imitate a "weed whacker". It was a humorous but very effective way to remind the talker that they were in the weeds.

Guiding Principles/Essential Elements

1. Meaningful engagement of institutional stakeholders is at the heart of the process. By engagement we mean face-to-face interaction and discussion.

2. Information gathered throughout the planning process is shared with everyone. Transparency is essential.

3. The role of the consultant(s) is to help tap into and build the capacity of the internal stakeholders and guide the planning process not direct it.

4. Attention is paid to the external issues and trends in higher education throughout the process so that institutional stakeholders don't focus too much on their own world. (We call this listening to yourself too much)

5. External stakeholders (alumni, community, business) are an important part of the process and are engaged in several phases of the planning process. This creates a well-informed and robust plan that intelligently responds to the pace and complexity of change and responds to the different stakeholder interests that surrounds every institution.

I. Getting Organized

It takes effective planning and organization to operationalize a collaborative strategic planning process. Good beginnings are essential to the success of the process; therefore, the president must do several things to ensure that an effective and efficient planning process takes place:

A. Communicate to the campus that the strategic planning process is important to the future of the institution and show their real interest, if not, enthusiasm for an inclusive, participative and transparent process. This has to be done throughout the process and not just at the beginning.

B. Establish a highly credible strategic planning task force (PTF).

C. Commit the technological resources to the planning process to ensure that everyone knows how to be involved, can contribute their ideas and feedback to the process and be fully informed through planning updates.

D. Clarify his/her role in the planning process as a champion and supporter but not a driver or controller of the process.

E. Visibly and authentically support the process by attending training sessions, communicating with the diverse stakeholder groups throughout the campus about the process and, most importantly, listening to people's concerns and aspirations.

Establishing the Planning Task Force (PTF)

The key to the success of a collaborative strategic planning process is a highly credible task force. The composition of the PTF will make or break the planning effort. Each task force member must have an excellent reputation and be willing to work hard over the course of the process. The PTF is both a thinking and doing group.

It is best to have two co-chairs, preferably a faculty member and a high level administrator (e.g. CBO, Vice President). Selecting the co-chairs is the first strategic thing the president does and will communicate volumes about the importance of the planning process and its potential for success. Choose wisely. The external consultant talks with the PTF co-chairs weekly to ensure quality communication.

The ideal number of task force members is somewhere between 20 & 30 highly credible individuals. Although we have worked with task forces of 60+, it can be challenging to work with such a large group. Advice on selecting PTF members:

1. The composition must reflect the diversity of the institution.
2. Try and avoid the "usual suspects" and include some individuals who rarely are asked to the table.
3. Include "informal leaders" who may not have a title, but have huge peer influence.

4. Each member should have an excellent reputation and respect for the institution.

5. The "mix" should be about 60% faculty and 40% staff and administrators. It is essential that faculty believe that they are well-represented or your planning process will fail.

6. Try to include one or two "curmudgeons", those individuals who are known for their skeptical attitudes and are most willing to share them. This will help provide rigor and credibility to the process. Do not have deeply cynical individuals on the task force. They will never be convinced of its authenticity and will only drag the process down. Skeptics are welcome, cynics need not apply.

7. The President's Cabinet should be well-represented on the task force because, at the end of the day, they will be charged to implement it.

Initial responsibilities of the task force include: 1) establishing a calendar of events for the year; 2) developing a communication plan, 3) identifying forums for engagement and data gathering (e.g., faculty senate meetings, staff and administrative councils, student government, etc.) and; 4) learning about collaborative planning and meeting designs that engage stakeholders thinking and passions.

II. Data Gathering and Engagement

The heart of collaborative planning is the meaningful engagement of stakeholders throughout the institution. Engagement means face-to-face interaction, discussion and dialogue. Although surveys have a role in any planning process, they are secondary in this kind of planning.

At the beginning of the planning process, a consultant works with the entire planning task force for two full days and shares a wide variety of highly interactive planning activities. Each of the activities creates real data from PTF members and teaches them how to utilize the activities. It is expected that once the PTF members experience the effectiveness and efficacy of the planning activities, they will then go out and engage a variety of stakeholders throughout the institution. A Stakeholder Review is conducted to provide a clear picture of who needs to be connected to and informed about the planning process as it moves forward.

Before the end of the second day, task force members organize themselves and create an engagement plan for the next two months. They will work in pairs to support each other and will engage faculty, staff, and administrators throughout the campus as well as external stakeholders. It is rather easy to meaningfully engage well over a thousand people over the course of two months. (Recently, we were involved with a regional university where 5000 stakeholders were engaged.)

Building the capacity of the task force members to implement the collaborative planning process does several things:

1) the task force members "own" the process because they are at the heart of it;

2) internal stakeholders witness their own people working hard to create an effective planning process;

3) it builds tremendous credibility for the planning process because it is something that is led by insiders and not by outsiders;

4) it builds the ongoing capacity of the task force members to continue to do collaborative planning in their own departments (e.g. self-studies) and administrative units after the planning process is completed and;

5) it saves a lot of money because insiders not consultants do most of the work.

III. Sensemaking

After the PTF has conducted dozens of interactive meetings throughout the campus, there will be a great deal of information generated. All the data that is gathered goes into a centralized database for planning task force members to review. At this stage, the PTF spends a full day reporting out their findings and agree on the strategic themes for the planning process (e.g. Academic Excellence, Diversity, The Role of Research, Community & Culture). Selecting the themes for planning is a transparent process that involves the entire PTF. Usually, 5-8 themes are selected to help focus the planning process.

After the strategic themes have been agreed upon, Concept Papers are then written to describe the strategic themes and their importance to the institution. The writing of the concept papers does several things:

1) they put some boundaries around the most important issues that need to be in the institution's strategic plan (everything cannot be in the plan);

2) it distills the information gathered during the planning process into "chewable chunks" so that stakeholders can be informed about the issues and not deluged with too much information and;

3) they are used to educate attendees at the future Vision Conference.

Concept papers are approximately five pages in length and lay person friendly. Their purpose is to educate people about a particular issue, not dazzle them with big words or complicated explanations. The papers provide a historical context about the issue, identifies regional, national and, if appropriate, international perspectives about the issues and clearly describes how campus stakeholders see the issue from all the data gathering that has taken place.

The concept papers are generally written by PTF members but they can utilize outsiders to help write them. All concept papers are reviewed by task force members and then sent out to the community at large via the campus intranet. During the writing of the concept papers there is a great deal of discussion and dialogue between PTF members. When the concept papers are finally produced, there is clear ownership of the information.

IV. The Vision Conference

The Vision Conference is a highly interactive, one day meeting involving somewhere between 50-75 stakeholders. Attendees at the conference are 60% internal (all the planning task force members attend) and 40% external. The main reason you invite external stakeholders (e.g. alumni, business community, neighborhood leaders) is to ensure that the institution has an external perspective in the room as they think about the future. In a large institution, you would have several one-day vision conferences rather than a large one with 100+ participants.

There are three distinct elements to a Vision Conference:

1. Review of the Concept Papers and Discussion

A highly engaging meeting design is utilized so that all conference participants have a chance to review the concept papers and glean the essential themes from each one. This usually takes two hours and helps ensure that all participants are well-informed about the institutional issues before they think about the future of the institution. A Vision Conference is not a blue sky, brainstorming session. It is grounded in quality information and institutional realities. The Concept Paper Review creates a shared experience and database for participants and helps set the stage for creating a “preferred” future.

2. A Stakeholder Review

The main reason you invite a diverse set of stakeholders to the Vision Conference is to be informed by their unique and distinct perspectives. The more institutional leaders understand how different people see the institution, the more informed they are. You want to paint a robust future picture of the institution and that can only happen if a wide range of perspectives are shared and understood.

A Stakeholder Review involves the different stakeholders at the Vision Conference (faculty, students, business, community, etc.) organizing themselves and having a discussion about how they see the institution’s future. The output of their discussion is 4-5 important ideas and themes from their unique stakeholder perspective that they would like to share with the other participants at the conference. Sharing the very different perspectives expands participant’s thinking, creates the opportunity to understand what is important to others and develops a more robust thinking pool of ideas.

Sidebar: At one Vision Conference, the business community communicated that were happy with the intellectual skills of the graduating students at the university but that they needed more students who could work effectively on teams and build relationships with others. The information greatly influenced the future pictures of the institution.

Sidebar: At another conference, the business community communicated that they wanted a more assertive presence of the university in their organizations. We don’t just need graduates; we need research, new business models, strategies, consulting, etc.

3. Creating a “Preferred Future”

The culminating exercise of the Conference is creating share pictures of the future. We have found that utilizing a five year framework seems to work best because it allows participants to do some horizon thinking while still grounded in current reality. Participants work in small (6-8) diverse groups (e.g. faculty, business, students, staff, etc.) and create shared pictures of the future based on the strategic themes from the concept papers. If Diversity is a strategic theme, we would ask them to describe what diversity really looks like on our campus five years from now. If Research is a strategic theme, we would ask them to identify the new research areas we have explored over the past five years.

After the Preferred Futures are created, each group makes a presentation to the whole group. (With large conferences, 75-100, a design is created so that the small groups work with another group to share their future pictures and agree on a shared picture together. This way you avoid 10+ presentations.) After the presentations, a facilitated discussion helps identify the many common ground ideas and themes from all the shared pictures. These elements are used to create a draft Vision Statement for the institution that goes out to the campus for review and refinement.

The planning task force usually charges a small group to write a draft vision statement and take responsibility for incorporating the feedback that is received into a final vision statement

V. The Goals Conference

Approximately one month after the Vision Conference, the planning task force convenes for 1-2 days to create a broad implementation plan for the institution. At this time, other stakeholders outside of the PTF are invited to lend their expertise and energy to creating the goals. Often, these are individuals who will be charged with implementing the strategic plan.

Participants utilize the new vision statement to create a set of strategic goals for each of the strategic themes (e.g. Diversity, Academic Excellence, Research, etc.). After the goals have been agreed upon, Action Plans are created for each strategic goal. Feedback processes are built into the conference to make sure that all participants share their advice and ideas in creating the Action Plans.

If there is not enough time to complete the Action Plans, a process for completion is established before participants leave the conference. The draft Action Plan usually goes to the President's Cabinet for discussion and review. It usually takes another month or so to produce a detailed Implementation Plan.

Summary

General Timeline – 1 Year

		Consultant Time
1. Organizing the Process	2 months	2 days
2. Data Gathering & Engagement	3 months	1 day
3. Sensemaking	2-3 months	1 day
4. Vision Conference	1-2 months	1 day
5. Goals Conference	1-2 months	1-2 days

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