

Section 3:

Meeting Techniques

Preparing for a meeting

Having meetings is an essential part of engaging volunteers in advocacy. Meetings help

you distribute information to volunteers. They help develop relationships among group members. They give you a chance to make group decisions and resolve group conflicts.

Most importantly, meetings ensure the viability of your group over the long haul. Longevity is the key to being persistent, and to be good advocates, you'll have to be persistent.

"In advocacy, being persistent is the most important thing. You need to show up again and again, and that's hard to do if you don't have an ongoing relationship with your advocates."

-Bill Tibbetts, Coordinator of the Anti-Hunger Action Committee, Salt Lake City, Utah

everyone at the meeting should have a copy. Write out the length of time each item will take, and if you want to, provide a brief explanation of each item. Include the date, time, and place of the meeting in a heading at the top of the page. See an example agenda in the materials section.

You may want to write two agendas: a public agenda with the

information the members need to know, and a staff agenda with the information you and the co-facilitators need to know. A staff agenda can include materials for the meeting and a greater description of agenda items. Next to

each item on the staff agenda, write who will be responsible for administering it. See Section 5 for examples of staff and public agendas.

Who decides what goes on the agenda is a big deal. At each meeting, and in between, you should try to assess what people want on the next agenda. Ultimately, there may come a point when volunteers will decide what goes on the agenda and draft it themselves. In the beginning, you will probably make most of these decisions. But you should try to incorporate into the agenda what the group has said it's interested in, which you've gathered through feedback sessions (discussed later in this section).

What you include in the agenda should be a **balance of action and planning**. By action, I mean engaging in an activity that is intended to *directly* make society better. By planning, I mean planning advocacy activities and building up the capacity of your group to do advocacy. *Both*

Set a time and place

As you know, you'll need a time and a place to have your meeting. For most meetings, you'll have decided when and where the meeting will be at the end of your last meeting. But for the first meeting, you'll have to decide for yourself. You'll probably want to have the meeting when people aren't working, such as the evening or on the weekend, and at a place that's east to get to and accessible by public transportation. Of course, check your schedule for possible conflicts. And when you're recruiting, make sure to let people know when and where the meeting will be.

Set an agenda

Every meeting needs an agenda to give it organization and purpose. Once the agenda has been decided, it should be written, and

*action and planning are necessary, and it's almost essential that you find a way to balance them **each meeting**.* See Sections 5 for examples.

What things do I need to get ready for the meeting?

- **Outreach Materials**

You'll want to bring lots of outreach/advocacy materials that will help the volunteers on the committee engage in advocacy. A copy of a legislative update, or an advocacy alert, or postcards may be appropriate (See Section 4). Bring more than enough. If you're making a presentation, hand out paper copies of it, so people can take notes and follow along. You may also want to bring fun advocacy gifts, like political buttons or patches.

- **Facilitator materials**

You may need all sorts of materials to facilitate your meeting. Some of this may seem obvious, but it's important to not leave it to the last minute to collect these materials. You may need a dry erase board, big pad of paper for writing things the group can see, pens, a computer, a projector, or screen to project on.

- **Sign-in Sheet**

Bring a sheet of paper for everybody sign in on. Make sure to get everyone's contact info.

- **Name tags**

You may want to provide name tags or table tents, since not everybody is going to know each other's names. Leave them by the sign in sheet with a pen.

- **Food**

You have to have some food at each meeting, particularly if it's early in the morning. You may need to bring silverware, cups, and plates.

- **Reimbursement**

Have your compensation forms ready, if you're going to write people checks, or some spare cash handy. And make sure to have some arrangement made if you're going to provide child-care on site. Volunteers may need to bring their children to the meeting.

What tasks do I need to do?

- **Remind people of meeting**

People forget about meetings. Try to give every member a call the week before the meeting. Send out a reminder email. When you see them, ask them if they're coming to the meeting. And when you're reminding people about meetings, let them know about compensation and that you can give them a ride to the meeting.

- **Do your homework**

Nothing's worse than an unprepared speaker. If you're going to give people an update, know what you're talking about. Practice it. If you're going to lead a discussion, have more than enough questions ready (See facilitation discussion for more).

- **Reserve a meeting room**

This may seem obvious, but if you don't have a suitable meeting room at your office, it may take more time to reserve a place to having meeting. It may also require funding. Make sure to give yourself some time to look for the best place. You may want to ask another service provider or community organization for space.

- **Delegate meeting tasks**

You may also want to have members take the lead on some of the agenda items, or contribute something to an agenda item. For example, at one meeting, the members of the CAN contributed to a legislative update,

since they attended the hearing we were talking about. Make sure to ask members ahead of the meeting if you'd like them to take a leadership role. Write down on the staff agenda who you've delegated a task to.

- **Send out your agenda**

Lastly, you may want to send your agenda out to the membership prior to the meeting.

More people may come to your meeting if they know what they could get out of it.

Supplement: What's an alternative to creating a network?

Instead of creating a committee that meets and communicates regularly, you could form a loose network of advocates that come together only to engage in a specific advocacy activity. For example, if you need volunteers to testify at a public hearing, you could get everyone together for the sole purpose of testifying. No meetings, no group- just some people you know who can do advocacy in their spare time. This can be an effective, cost-efficient way to engage low-income volunteers, if you don't have many resources, and if there's not much advocacy to do in your community.

- **Relationships matter more**

Such a network will be based almost entirely on the personal relationships you have with low-income volunteers. It may also be based on the relationships you have with professionals who know low-income people. If you have to find somebody to do advocacy, go through any of your relevant connections. Cultivate these connections, as your network's networks viability will depend almost entirely on it.

- **Communication will be harder**

You'll still need to have some communication structure to let people know about advocacy opportunities. An email list or a database of phone numbers could suffice. However, you won't be able to communicate through meetings.

Leading a Meeting

This section introduces a few key concepts, tools, and tips

that should help you facilitate a meeting successfully.

The agenda

The primary role of the facilitator is the steward of the agenda. The agenda is a contract between you and the group. The group has, more or less, delegated you the authority to move them through the items on the agenda. You're the designated mediator of disputes and conflicts related to the agenda. For example, if an item is running long, you've been implicitly tapped to move the meeting to the next item. Or you may be forced to interrupt someone if they're talking about something off-topic.

Make sure that you explain that what you're doing is in the group's interests. You could say, "Thanks for that contribution, and I know everyone's got a lot more to say about this. We can talk about it at our next meeting, if you'd like. But I want to get you all out of the meeting when I said I would. Would it be alright if we moved to the next agenda item?" You need to show that by enforcing the agenda, you're not making a personal attack or only doing what you want. You're fulfilling a promise to the group to move the meeting through the agenda.

Ground rules

The **ground rules** let everyone know what's in and out of bounds at a meeting. In your

first meeting, you should have a discussion about what rules should guide the group at meetings and elsewhere. In general, there are a couple of subjects your rules should cover:

Meeting and Discussion Rules: You may want to make Some rules on what people can and can't say, and when they can say it. For example, we had a rule that you couldn't interrupt other people while they were speaking, and that nobody was allowed to speak twice in a row. We also created some rules on staying on topic during a discussion.

Meeting Attendance and Logistics: We tried to create some rules on how often people should come to meetings. We decided that everybody should try to come to as many meetings as possible, and that we would alternate when we were having each meeting from weekends to weekdays, as not everybody could make weekend meetings.

Now that you have your rules, write these rules down on a big piece of paper, and, if necessary, keep them posted at each meeting. This is a product of the group. As with the agenda, it's a contract between you and the group, and it's your job to enforce the rules at a meeting. If somebody breaks the rules, you should remind them about what you all agreed on at the first meeting. That way, it's the group's decision to limit behavior, not yours. Again, **the less it seems that you are doing what *only you* want, the better.**

Don't worry if you find it tough to enforce the ground rules. It may take some time for you to feel comfortable interrupting the meeting if you don't know the members of your group well. Something you might say, if, for example, somebody was speaking too often, "I hear that you've got a lot to say on this issue. But I want to make sure that everybody gets a chance to speak their mind, which we said we'd like to do in the ground rules. Could we come back to your comments in a bit?" It's always good to explain what you're doing. If the group disagrees with your decision, it's not the end of the world. Facilitators make mistakes, and you can always be flexible.

Some additional pointers

- **When people walk in to your meeting, try to greet them.** If you don't know them, you ought to introduce yourself.
- **You'll be in charge of beginning the meeting.** Make sure to begin your meetings on time, but try not to be rude if someone's having a conversation when you'd like to start. If you start talking, they might end

their conversation. You could also ask them politely to direct their attention to you and the meeting.

- **At the beginning of the meeting, ask members if they'd like to add anything to the agenda.** It's a great way of including group interests in the agenda.
- **People may show up late. You should have them quickly introduce themselves, and then get back to the meeting.** You also may need to help them get a seat, any outreach materials they need, and an agenda.
- **At every meeting, you'll need to schedule the next meeting.** You can do this right as you close the meeting. Ask everybody when they'd like to meet again. Make sure to take into account any rules you've adopted to schedule meetings in a certain way. Also, bring your schedule along, so you know when you're available.
- **You'll also be in charge of ending the meeting.** Try to do so on time. Don't rush people out of where you're meeting if you don't have to. If people linger to talk to each other, it's a sign that they liked the meeting.

Facilitating Discussions

It's essential to know how to facilitate a

discussion well, as your first meetings will involve many discussions. In this section, I'll introduce some of the basics of facilitating discussions. For further information, you may want to read a good book on facilitation, of which there's a list at the end of this section.

Take notes

I find it really helpful to take notes while I'm facilitating a discussion. It mostly helps you summarize the discussion once it ends, but it also focuses your thinking and can be added to the meeting minutes. It can be very helpful for the group if you take notes that everyone can see. You can put the notes on a giant pad of paper, a dry erase board, or even on a transparency that's projected on a screen.

Enforcing the contracts

Your two contracts will come in handy when you're facilitating a discussion. Try to keep your discussions limited to the time you've allowed in the agenda. It'll be your job to get the group to move to the next agenda item.

The ground rules are especially helpful, as many of them should relate specifically to discussion behavior. It, again, is your job to enforce those rules. When you're enforcing the ground rules, make sure to let people know that what you're doing is mandated by the ground rules. You could say, "I hear that you feel strongly about this subject, Ms. Y, but in the ground rules we said we'd try to let other people talk after we've said our piece. Ms. X, it looks like you've been waiting patiently to say something."

It's also helpful to have your ground rules give you the authority to keep the discussion on track. If the discussion is veering too far off topic, you can say "These ideas are important, but let's hold off on them for another meeting. Is it okay if I put them in 'the parking lot' for now, and bring them up at a later discussion?"

Listen rather than lecture

Your role as the facilitator of a discussion is to **get everyone else to talk**. The best way to do that is to ask as many questions as needed, and keep your statements to a minimum. Bring a list of more questions than you'll need. You should be prepared to fill any awkward silence.

Try to practice "active listening."

That means asking follow up questions when you don't quite understand something. Dig deeper when somebody says something interesting. Summarize what they saying, "So what I hear you saying is that access to food is a big issue in your community." Or say "do I understand you correctly, that you're saying that access to food is a big issue in your community?" Or to dig deeper, "It seems like access is a big issue. Why is that?"

Make sure that you achieve maximum participation from all group members.

If someone is silent, they're probably losing interest. Sometimes it's helpful to ask them a direct question, as in "Have you found X to be true in your experience, Ms. Y?" Recognize, though, that some people may need some time to feel comfortable speaking out.

Try to create a "no-judgment zone."

You'll need to make people feel comfortable and that they aren't being judged. When we created our ground rules, we talked about trying to foster an atmosphere of non-judgment. You also may want to have a brief discussion about the stereotypes that people encounter. Everybody in the group should understand that certain things they say could be offensive. And raising that topic can assure volunteers that you're dedicated to fostering a tolerant, understanding atmosphere at meetings.

Summarize your discussion

A great way to end a discussion is to summarize it. Try not to wind up the discussion in the middle of a big idea, but once the pace of the discussion dies down a bit, you should try to summarize what people said. This gives everyone something to take away from the discussion. You don't need to be too detailed- highlight 4 or 5 themes that the group seemed to think were important.

Facilitation Resources

The Art of Focused Conversations: 100 Ways to Access Group Wisdom in the Workplace by R. Brian Stanfield

The Facilitative Way: Leadership That Makes a Difference by Priscilla Wilson

Organizing for Social Change by Kim Bobo, Jackie Kendall, and Steve Max

SAMPLE LIST OF QUESTIONS FOR FACILITATED DISCUSSION

Questions for Trainings Discussion:

1. What are some skills that you'd like to have?
 - a. What do you not like doing?
 - b. What kinds of skills trainings would put you at ease?
 - c. How much would you like to know about how to mount a campaign to make a policy change?
 - d. Which skills would you want to learn now, and which later?

If someone asks for an unusual training, ask:

 - i. How will that skill make you a better advocate?
2. Which of these skills are most important?
 - a. Will this skill help you advocate immediately?

What are we doing now that would be affected by developing this skill?
 - b. Will this skill not be useful now, but very useful later?
3. What can OFB/CAN do to develop those skills?
 - a. Julie, can you think of an event? A training? A speaker? Who should we bring in? What wouldn't be too much trouble for CAN members?
 - c. How long will it take for this skill to develop?

Retaining Members

You'll probably find that there are lots of

people who'll come to a meeting. The hard part is retaining them. Volunteers, of course, can come and go as they please. So how can you ensure they come back?

Make sure it's worth it

First, recognize that individual priorities and contributions matter. The more valuable volunteers think participation is, and the more they care about what they're working on, the more likely you'll retain them.

- **Get feedback.** Try to get lots of feedback on your group's priorities, the advocacy activities you're engaging in, and the structure of the group. Try to make the changes that people ask for. See the section entitled "Building a Strong Group Identity" for more information on how to get feedback.
- **Give members responsibilities.** If a volunteer has more responsibility, they may feel that they're making a greater contribution to the work of the group, and therefore a more valuable group member. It may help to start with minor responsibilities, like contributing some thoughts to an informational session at a meeting.
- **Follow up with a leaving member.** If a member wants to leave the group, you might want to ask them if there's any other way they'd like to

contribute. They also might have a problem you could help solve, if only you ask. Make sure to follow up with them if they don't come back to a meeting.

Relationships

In the long run, many volunteers will stay with a committee because of a relationship. They may have a strong relationship with you, somebody in the group, or the group itself. Try to foster relationships among people in the group and between yourself and group members. Let people stay a while after the meeting to talk. Take every opportunity to listen to and get to know a volunteer.

- **Following up.**

Many volunteers cite the follow-up that a group leader did as the way they built a relationship with a facilitator. When you follow up, you're giving somebody

individualized attention, which everybody likes. You're showing them you care about their opinion. You can also get to know them better in a private setting, and they can get to know you. It can help retain members.

Reward Participation

You may also try to reward participation. When people do something for the group, you can reward them any number of ways. Sometimes public recognition is enough of a reward. Other times, you may want to offer

Small successes retain members.

Ultimately, retention will depend on how successful your meetings and advocacy activities are. To ensure volunteer retention, you may want to engage in some easily winnable issues early on. Sometimes, a small success can mean just showing up and speaking out at an advocacy event. It felt like a success when CAN members spoke at an Oregon House hearing, even though no policy change has yet resulted. See Section IV for more ideas on advocacy events that produce small successes.

gift cards to volunteers, if they've made an extra effort.

Another way to reward members is by handing over control of a meeting. Let them talk about the advocacy they've done. For example, we had everybody who had done some advocacy talk about it in a review session. And you should think about asking them if they want additional responsibilities as they participate in advocacy more.