Leading a meeting. Before, during and after

Leading a meeting. Before, during and after

This section takes you through practical tasks to help you lead a meeting. We've included a checklist on page 28 to help you stay on top of everything.

Remember

The main thing is that you're comfortable with your tasks and have the support you need. Staff support is always available, and it might help to chat with a staff member to decide who's doing what.

Want to build up to leading a meeting? Try these 3 steps.

If you want to work up to chairing a meeting, why not let a staff member know? Talk to them about what support you need and ask questions if you're not sure about anything. These 3 steps can help.

Step 1

Meet with the staff member to talk about the meeting you'd like to help with. You could start by taking on a supporting role, like welcoming people to meetings.

Step 2

As you become more confident, take on a role like vice-chair or timekeeper. You could also lead sections of the meeting, but not the whole thing.

Step 3

Lead a meeting with support from a staff member on any tasks you're not comfortable with yet. You could help to draw up the agenda. Or you could co-chair together.

Before your meeting

Ask how your staff member can support you.

Are there training or resources they can give you? Who will invite people and send out the time, date and location/joining details?

Find out if you can join a meeting before leading it.

If the meetings are already running, can you go along to find out more? Or are there old agendas or minutes you can look at?

Find out if anyone has previously led the meeting.

It might help to meet them to hear about their approach and to find out any tasks you might have missed.

Set roles and responsibilities with the staff member supporting you.

They will usually send out invitations, set up the room and sort out any tech. The chairperson usually facilitates the meeting. But make sure you both know the plan beforehand.

Ask people for any help you might need.

You don't need to do everything yourself. See some of the roles you could ask for help with.

If it's a new meeting, create a group agreement.

That's an agreement that makes sure everyone feels safe. See our tool for creating a group agreement. Page 35

Trigger warnings

If you might deal with sensitive topics around mental health that could be triggering for people, it can be helpful to put a trigger warning on the agenda. You can let people know that the conversation might be triggering on the day too. That gives people the chance to step away from the meeting.

You can ask staff at local Mind for any guidance or policies on trigger warnings.

Something like this could work well:

Please note this item could be triggering for some people. We might discuss... If you are at all worried, please feel free to leave the meeting during this item.

Writing an agenda

It's really important to spend time putting an agenda together. It lets everyone see what you will talk about and why, with time frames. It can help to write yours with a staff member or people who go to the meeting regularly.

You might want to:

✓ Talk to staff or a previous chairperson about why you're having the meeting and if the meeting group needs to make any decisions.

✓ Find out if there are any items that are always on the agenda (if it's a regular meeting). Do any actions from the last meeting need to be followed up?

✓ Ask people attending the meeting if they want to add anything to the agenda, before it's sent out.

✓ Plan out how much time to spend on each agenda item.

✓ Note who will introduce each item (the chairperson, an external speaker or a the person who asked for an item to be included).

✓ Schedule any guest speakers early in the agenda, so they have plenty of time.

✓ Schedule in breaks. One every hour is ideal.

✓ Plan when you will send the agenda and any reading material. We recommend doing it at least a week before your meeting.

✓ Clearly let people know if they need to take any actions before your meeting.

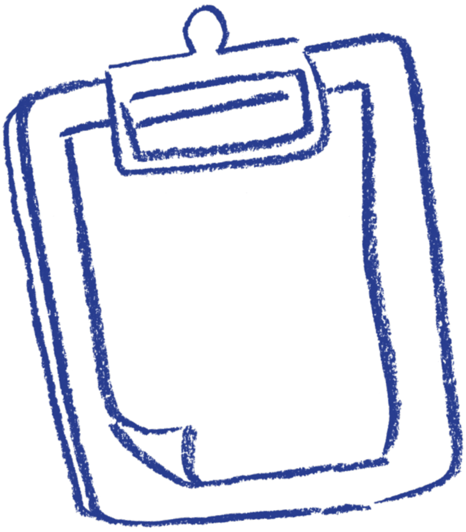
✓ Explain how any decisions made will be shared with your local Mind.

Top tips

Put the scheduled start and finish times on the agenda, along with the total meeting time. This helps every-one be mindful of how much time there is for discussion.

If you can, try and build in 10-15 minutes in the agenda for discussions running over. That way, if items do take longer than planned, you can still finish on time.

Example agenda items



You might want to include:

- ✓ Introductions and check ins
- ✓ Updates on any actions from past meetings
- ✓ Items you will discuss together
- ✓ Time after each topic to check on what actions people will take and who's responsible
- ✓ Any other business (AOB) that people want to raise

> **“Try not to be too ambitious about topics and avoid a rushed meeting. You want sufficient time and opportunity to go through the agenda, but also to allow the attendees to speak.”**

> **“Don't be afraid to ask for a co-chair who could ensure everyone who wants to speak is invited to. Or perhaps they could be responsible for the admin or tech issues in an online meeting.”**

> **“Make sure someone else takes notes or minutes – you'll struggle to chair and take notes!”**

Example agenda

This is an example agenda of what the first meeting of a group could look like. In this instance two people Carina and Mohammed are co chairing the meeting.

Time	Agenda item	Actions	Tasks to do in advance	Who is leading this section
12.00-12.10 (10 mins)	Introductions	A chance for you to introduce yourself and let people know why you're here	No	Carina
12.15-12.25 (10 mins)	Warm up exercise	What is an activity you enjoy doing?	Yes – please think about this before the meeting	Mohammed
12.25-13.00	Creating a group agreement	Together we can decide on a few guidelines for our meetings.	No	Carina
13.00-13.10 (10 mins)	Break			Mohammed will introduce the break
13.10-13.40 (30 mins)	Talking about our aims and focus	A chance to agree what we hope to achieve	No	Mohammed
13.40-13.55 (15 mins)	Any other business	Your chance to discuss anything not on the agenda	No	Carina
13.55-14.00 (5 mins)	End of meeting	Check out. Agree any actions and the next meeting time.		Mohammed

Agenda (Meeting title/date)

Time	Agenda item	Actions	Tasks to do in advance	Who is leading this section

During your meeting

There are lots of things you can do to help your meeting go well. For starters, it's a good idea to open the meeting up early. It gives people a chance to settle in and ask questions. You can do this for online meetings too, by letting people know you will log on a few minutes before the start time.

Top tip

The **#MyNameIs campaign** helps people find the best spelling of their name so others can pronounce it correctly. Before online meetings, you could ask everyone to visit https://www.raceequalitymatters.com/my-name-is and include this spelling next to their name.

Introductions

- If it's a new meeting or new people have come along, you should start with introductions.
- Ask people for their name and pronouns (he/him, she/her, they/them). Online, people can add their pronouns to their name on screen. It's a good idea to give people the option to introduce themselves by speaking or using chat.
- Make sure each person introduces themselves.
- You could ask for more information too. Like people's jobs or roles, where they are based and why they are in the meeting.

If people are late

- This can happen. It's fine to start without people and to explain you're doing this so you have time to cover everything.
- If people do arrive late, try to pause to welcome them and let them know where you are in the agenda. You could also ask them to give a quick introduction if people haven't met before.

Helping people take part and feel comfortable

- Online, give people the option to have their cameras on or not.
- Let people know how they can tell you they want to speak. Online this might mean using the raise hand function.
- Make time for people to check in and say how they are today. Read our tips. Page 43
- Offer different ways for people to take part in discussions. Read our tips. Page 37
- Makes sure you take scheduled breaks.

Supporting people to move through the agenda

- Keep people focused on the agreed issues. Try to avoid topics not on the agenda.
- Agree any actions that come out of your discussion. It's great if there's a person responsible for each action, and a deadline.

"Be organised, set your agenda and make it clear from the outset so it sets expectations for the group and avoids going off in the wrong direction."

- Chairperson with lived experience

Keeping to time

- Have a watch, clock or phone you can use to keep an eye on the time. Or ask someone to let you know if you are running out of time on an agenda item.
- Let people know when time is running out in a way that's sensitive to their wellbeing.

Use moving-on phrases like:

Thanks, that was really useful but we need to move on now. Or **We can put this in any other business to pick up later.**

See more time keeping tips Page 32

Ending a meeting

- Thank everyone for coming and taking part
- Ask the note taker to sum up any main actions and decisions. This helps people see what's been achieved.
- Remind people of the time and date of the next meeting. And ask them to let the staff member know if they can't make it.

Top tips

It can help to have post-it notes with you so you can write down any key points.

How to write minutes or notes

It's difficult to note down everything people say, so don't feel like you need to. Instead, it's helpful for the chair and the note taker to discuss what's important beforehand.

Top tip

It's a good idea for the same person to take notes over several meetings. It helps them become part of the meeting group and get used to how people talk and the language used.

What are the main points that should be written down?

It can help individuals in the meeting feel valued to see they have been heard. Think about how everyone's voice can be represented in the notes. You can check with people if they would like to referred to by their initials in the notes.

And it's useful for your minutes to relate to your agenda. You can add your agenda section headings into the minutes template below. It'll help you (or another chairperson) create the next agenda.

Actions

- In the notes, bold any actions that need to be followed up. They can then be easily picked up in future meetings.
- Note down what the action is, who is doing it and when. One or two people for each action usually works best.
- Clarify the list of actions at the end of the meeting, so everyone agrees who's doing what.

Decisions

- If you've made decisions in the meeting, log them in the notes. Maybe you've agreed how long meetings should be or to have a suggestion box at reception. Writing these things down helps them stick. You might also use a decision log during your meeting. You can find templates if you search for decision logs online.

What not to include

- Don't include any personal details. If people talk about any diagnosis they've been given or about their lived experience, this shouldn't be written down.

"I didn't feel very qualified to do this role with no formal training but I have grown into the role and have improved my skills along the way with the help of the chair and staff lead. A learning session was organised with the staff minute taker too."

- Chris, Note taker with lived experience

Minutes

Date of Meeting	Note taker
Attendees present	**Attendees absent**
(Use initials for people's names)	(use initials for people's names)

Actions from last meeting
(If there were any) 1.Do this

Agenda item 1:

Agenda item 2:

Agenda item 3:

Any other business
(Include any topics that need to be included in the next meeting, or decisions that need to be made)

Actions for the next meeting		
Action:	Who will do this:	Deadline:
Action:	Who will do this:	Deadline:
Action:	Who will do this:	Deadline:
Action:	Who will do this:	Deadline:

After your meeting

Send an email

It's a good idea to send out a summary email to everyone after your meeting.

A staff member normally sends this, so check what they will include. It's usually;

- The minutes/notes
- Any actions and who is responsible for them
- A reminder of the next meeting date, time and details (online or the location)

Reflect on how it went

Take time to reflect on what you've achieved and how you can continue to improve your skills. Think about what went well. Ask for feedback from the people who came or the staff member on anything you could work on for next time.

What went well?

What I want to work on for next time?

Meeting checklist

Complete this checklist to make sure you're prepared for your meeting. There's space to add in anything else you feel would help or you want to make sure you remember.

Before your meeting

- [ ] Agree meeting time and date
- [ ] Agree with staff member when you will create the agenda together
- [ ] Ask people who attend the meeting for agenda ideas
- [ ] Create the agenda
- [ ] Check with staff member that they have sent the agenda and all meeting details (time, date, location or online link)
- [ ] Ask for any support you need in the meeting
- [ ] Arrange a note taker
- [ ] Do a test run of any tech (if needed)

Equipment checklist

- [ ] Pen/paper to write notes for yourself
- [ ] Watch/clock/phone to keep track of time
- [ ] Agenda (printed or on screen)
- [ ] Tea, coffee and water for people attending
- [ ] Is there anything else that could support your wellbeing and help you do your best?

After your meeting

- [ ] Write down what went well and anything you want to work on for next time
- [ ] Make sure a summary email is sent as soon as possible after your meeting.

Other Checks

- [ ] ______
- [ ] ______
- [ ] ______
- [ ] ______
- [ ] ______
- [ ] ______
- [ ] ______
- [ ] ______
- [ ] ______