

The Art of Purposeful Leadership

PUTTING PEOPLE FIRST

Meeting Design Worksheet

Name: _____ Date: _____

Case Study Title: _____

| | |
|--|--|
| | <p>1. At the Heart of the Matter</p> <p>What is the core purpose of the meeting? State why you are meeting, outcomes and expectations. Building Trust: What is my purpose? What is our purpose together?</p> |
| | <p>2. Clarifying Intent</p> <p>What is the intent of the meeting? What will you do? Begin to build a design or agenda for your meeting. Building Trust: What are your intentions? Check that your intentions line up your intended purpose.</p> |
| | <p>3. The Invitation</p> <p>Who will you invite? Who should be included? Building Trust: Why should they come? What is in it for them?</p> |
| | <p>4. Setting Context</p> <p>How will you describe the form, function and purpose of the meeting once the meeting has begun? Building Trust: How does my design build safety for me as the convener?</p> |

| | |
|--|---|
| | <p>5. Creating the Container</p> <p>Describe the physical space in which you will meet. What materials and aids will be in place? Be specific. What are the norms and agreements? Building Trust: What is my role in creating a safe and enlivening space in which to do our work?</p> |
| | <p>6. Hearing All the Voices</p> <p>Outer: What design invites each person to speak? Building Trust: What methods and practices will allow for the full expression of all participants?</p> |
| | <p>7. Essential Conversation</p> <p>What are the success factors for a fully engaged meeting? How will you know when it occurs? What wisdom is showing up? Building Trust: Have you adequately prepared for essential conversation to occur?</p> |
| | <p>8. Creation</p> <p>What do you wish to create that is new/innovative in this meeting? List potential opportunities/possibilities that stretch you. Building Trust: How will you recognize and harvest the wisdom being created?</p> |
| | <p>9. Commitment to Action</p> <p>What significant commitments, responsibilities and accountabilities do you expect from yourself and others from this meeting? Building Trust: What is needed to allow for the highest level of commitment, responsibility and accountability to occur?</p> |