

## Active Meeting Engagement – Examples

**Disclaimer:** This document is not intended as legal advice. Your organizational goals, purpose, bylaws, and values should drive the creation of this document.

Drawing out board or team wisdom and encouraging everyone to participate in your board meetings will often require techniques that differ from those used in a formal meeting that follows parliamentary procedure. Each method listed below has its strengths and requires different amounts of time. Be cautious, though, about using too many tools in a single meeting. Each technique should be clearly explained to the group for maximum success. If parliamentary procedure is the norm in the room, be sure to get buy-in from the group before using these tools, as they require some flexibility in the strict application of parliamentary rules. For more information on effectively engaging the team, [check out our blog](#) on using different strategies in the board meeting.

Technique	Tips on Implementation	Best use
<b>Discussion leaders:</b>	Opportunity to share leadership or ownership of various issues. Designate in the agenda different board members to lead the discussion – often the chairs of the committees.	This is a useful strategy to work on succession of leadership and mentoring with the board. Also useful to ask a board member to lead a session where hearing more points of view from others is helpful in making a decision.
<b>Silent starts:</b>	Opportunity for a quiet reflection on an issue. Post issue on the agenda. The meeting begins with 1-2 minutes of silence for each person to contemplate their response before the discussion begins.	This strategy can be used as a way to ground everyone. This is especially nice if meetings come at the end of a long workday. Great strategy to help analytical thinkers and introverted learning styles find their voice in a fast-moving or talkative team.
<b>Index cards:</b>	Comments or suggestions are written on cards and passed to the chair. The chair reads them to the group. No discussion is necessarily needed.	This strategy is useful to ask questions or confidentially make comments.
<b>Panels:</b>	Create a panel of experts on a topic or to hear from those with different points of view on a particular topic. Provide a moderator and time for questions and answers with the board.	Opportunity to provide background, education, and new perspectives to inspire and generate a future decision by the board.

<p><b>Breakout groups:</b></p>	<p>Create small groups to work independently for a specific amount of time. Create an opportunity for reporting back to the full group. Assign a “reporter” and a “recorder” for each group to capture the notes of the session and streamline the reporting back to the full group of the highlights or recommendations of the group.</p>	<p>Good for difficult topics or topics that do not have a clear resolution. An excellent strategy to hear from more people who are more comfortable speaking in a smaller group. Excellent to test ideas and take the “temperature” of the small group before hearing from the full group.</p>
<p><b>Site visits:</b></p>	<p>Take the meeting on the road. Plan to drive together or arrive at the location in time to become grounded as a team before the tour. Create time together for reflection and celebration, depending on the intent of the visit.</p>	<p>Appropriate for organizations that are looking to motivate and connect board members and potential board members to the mission, outcomes, or goals of the organization. Also, helpful if the organization needs to relocate to a new space. Can provide generative conversation based on real-world stories.</p>
<p><b>Simulations:</b></p>	<p>Role-playing by the board itself to build skills in a safe environment.</p>	<p>Great way to practice a difficult discussion or learn a new skill.</p>
<p><b>Case studies:</b></p>	<p>Case studies are usually written in a way that promotes large or small group discussions. Most are written with open-ended questions to promote discussion within the group. It is easier if you have a neutral facilitator to bring the hypothetical discussion and solutions back to the concrete world of the organization.</p>	<p>Good way to discuss a dilemma without making it personal. Also helpful to learn from others and lessen the feeling of isolation.</p>