THE UNIVERSITY OF UTAH
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Wallace Stegner Center for Land,
Resources, and the Environment

ENVIRONMENTAL DISPUTE
RESOLUTION PROGRAM

PACER
Meeting Preparation Worksheet

This worksheet is designed to help you think through the key elements of effective meetings—or what is known as PACER: purpose, agenda, code of conduct, expectations, and roles and responsibilities.

PURPOSE

What is the purpose of the meeting?

- Everyone in the meeting should be clear about the meeting's purpose.
    - It is a good idea to include the meeting purpose at the top of the agenda and/or with any information you send out in advance of the meeting.
- Questions to ask yourself:
    - Why are you bringing people together (i.e., what work do they need to do together and/or what conversations do they need to have?)?
    - Why now? Is now the right time?
    - Who needs to be there to help the group achieve the meeting purpose?
        - Can you get the necessary people to come? If not, how will you address that?
    - Do you really need a meeting or is there some other way to better achieve your purpose?
        - If people don't really need to come together to do work or have certain conversations, then maybe a meeting isn't necessary.

AGENDA

What must be included in the meeting agenda to achieve the meeting purpose?

- Create an agenda that lays out how you are going to structure the meeting to achieve the meeting purpose.
    - Outline who will do what and how much time you anticipate allocating to each section.
- Questions to ask yourself:
    - How can you structure the meeting to help achieve the meeting's purpose?
        - What structure(s) will help the group do its work and/or help people have the conversations they need to have?
        - How can you sequence topics and activities to help the group do its work and/or help people have the conversations they need to have?
            - E.g., does certain information need to be presented before people can discuss an issue productively? If so, can this information be provided in advance of the meeting?
    - How much time do you realistically need to achieve the meeting purpose?
        - If the amount of time you have for the meeting is limited or pre-set: What is realistically achievable within the amount of time you have? Do you need to change your meeting purpose?
    - Does your agenda need to be flexible? If so, design your agenda accordingly – but still have an agenda to keep you and the group on track.
        - Consider building in contingency plans (i.e., "if this happens, then we will do this").

- You can always send out a list of agenda items to participants in advance of the meeting rather than a formally structured agenda.

CODE OF CONDUCT
What are the standards of conduct for facilitator or mediator, convener, participants?
- Always make clear what the code of conduct is (i.e., standards of professional practice for the facilitator and etiquette and/or ground rules for participants). If a group meets more than once, establish a code of conduct and then remind people of the code of conduct as needed. You can send out the code of conduct with meeting preparation materials and/or remind people of the code of conduct at the start of the meeting.
- Questions to ask yourself:
  - What codes of conduct does this group need to be effective in doing its work?
    - If you are conducting your meeting online or in a hybrid fashion, you may need to go over additional codes of conduct for how to engage in a virtual/hybrid environment.
  - What code of conduct does this group need to be effective in achieving the meeting purpose?
    - If the group has established a standing code of conduct, you may still need additional ground rules for certain meetings or conversations.
  - What are you going to do if someone doesn't adhere to the code of conduct?
    - Are you ready to intervene?
    - Do participants have permission to hold each other accountable to the code of conduct? If not, should they? If so, perhaps make that part of the code of conduct.

EXPECTATIONS
What are the specific outcomes/outputs people can expect from the meeting?
- Every meeting should have specific, stated outcomes. These may be a combination of substantive, procedural or relational desired outcomes.
  - It is a good idea to review these at the beginning of the meeting ("By the end of this meeting, we will have met X, Y, and Z desired outcomes – does that sound right? Are we missing anything important?") and then to come back to them at the end of the meeting ("Did we achieve X, Y, and Z?") .
  - Make sure your expectations are directly tied to the meeting purpose; if not, you need to adjust your meeting purpose or expectations.
- Questions to ask yourself:
  - What can we expect to accomplish in this meeting?
  - How do those outcomes help us achieve the meeting purpose?
  - Are the expectations realistic for the time we have and the people who are coming to the meeting? If not, adjust your expectations – or adjust your meeting plans.

ROLES AND RESPONSIBILITIES
Who is going to do what and when before, during, and after the meeting?
- Set clear expectations for who is going to do what and when to set the meeting up for success.
  - When a team is working together to host a meeting, it is helpful to create an "internal agenda" for the team that clearly lays out who is going to do what and when to avoid confusion and ensure the work is being spread out.
    - Think about what needs to happen before, during, and after the meeting.

- o Common meeting roles include: Meeting convener (the person who is hosting the meeting), facilitator (the person who is going to run the meeting, keep people on task, watch time, ensure the code of conduct is followed, etc.), and recorder/scribe (the person who is going to take notes, capture action items, etc.).
    - ▪ The same person can play a few of these roles. That said, having one person do too much during a meeting often isn't effective. Try to spread the work out.
- Questions to ask yourself:
  - o What tasks need to happen before, during, and after the meeting and who can be responsible for those tasks?
  - o If working with a team, would it be helpful to have an internal agenda for the meeting team that lays out who is going to do what and when? Do we need to do any additional preparation to ensure everyone is ready to fulfill their roles and responsibilities effectively?
  - o Who is going to take meeting notes and/or capture action items?
    - ▪ What type of meeting notes are needed? Do we need a running record of the meeting, do we just need action items, or do we need something in between?
    - ▪ Every meeting should conclude with clear action items that lay out who will do what by when to move things forward. Go over these at the end of the meeting and then send them out in a follow up email, if possible.
  - o Do you need an impartial or highly skilled facilitator?
    - ▪ If so, do you have the resources to hire someone or can you recruit someone from your organization or a partner organization to help?
  - o Who needs to convene the meeting (i.e., host the party) to get the right people to show up?