

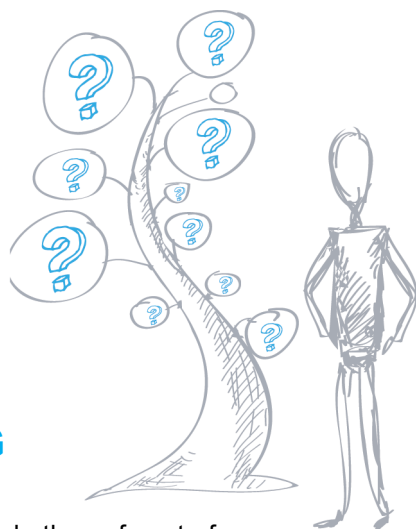
GLOBAL MEETINGS

/ Deciding whether, and how, to organize a global meeting /

WHAT IS A GLOBAL MEETING?

Meetings are important means for any organization's staff and partners to stay connected, exchange ideas, learn, and generate solutions to advance the organization's work. The norm should be that they are well planned, make good use of staff time and expertise, are efficient and conducted well. This guide aims to help better coordinate and rationalize global meetings.

The definition of a global meeting for the purposes of this guide is: A special, periodic or large face-to-face meeting that involves staff from multiple offices and requires travel by at least some participants. Examples may include workshops, network meetings, functional meetings, consultations, meetings involving external parties, and other face-to-face meetings involving staff from multiple offices.



PLANNING

- ▲ Question whether a face-to-face meeting is needed. Is the need more for one-way information dissemination, or for two-way information sharing and collaboration? The latter can be a sound basis for a meeting. (For additional decision-making criteria, see also 'Requirements for an effective global meeting' below.)
- ▲ Set objectives for the meeting before planning the agenda. Consider

whether the meeting will contribute to key strategic results.

- ▲ Manage costs by limiting meeting frequency: For example, you may decide that global technical/functional networks should meet maximum once per year, while technical/functional networks that meet regionally can consider meeting globally every other year.
- ▲ Different global technical/functional networks with topics that are linked and/or complementary, and that require the same participants, could hold combined meetings.
- ▲ The timing of meetings should take into consideration peak workload periods for the organization. Preferably, meetings should not be held during such periods.
- ▲ Meetings should be costed and budgeted in office workplans, and approved by the respective Head of Office/senior manager. Meeting venues should take into account cost-effectiveness factors.

▲ Save the date notices with meeting objectives should be issued well in advance, e.g. 3 months prior to a global meeting. Save the date notices should also include nominations for participants. Heads of Office or staff coordinating the work of multiple offices are often best positioned to nominate participants.

▲ Meeting agenda, session flows, names of facilitators, and other key details should be sent to participants perhaps 6 weeks prior to the meeting.

▲ For meetings involving multiple organizational units, an overall coordinator should be designated with authority to keep things on track.

▲ Pay close attention to any organizational guidance on increasing efficiencies in spending on travel and meetings.

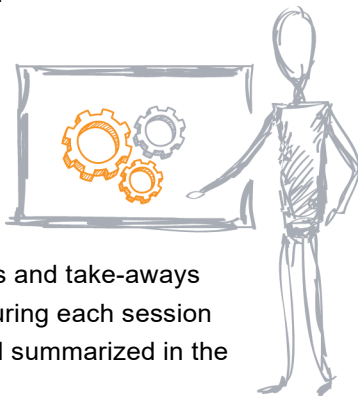
EXECUTION

▲ Key action points and take-aways should be discussed during each session of a global meeting and summarized in the closing session.

▲ Meeting feedback/evaluation forms should be completed by participants in the closing session and the analysis included in the meeting final report.

▲ Meeting minutes/reports should be shared preferably within 2 weeks after the meeting.

▲ Follow-up actions should be addressed and a status report issued periodically, or presented in the next meeting of a recurring series.



REQUIREMENTS FOR AN EFFECTIVE GLOBAL MEETING

Global meetings can be effective when **all** of the following are true:

▲ The organizers have reflected carefully on the issues, and know clearly the purposes a meeting will serve.

▲ The purposes relate directly to accomplishment of the organization's strategic plan and corporate priorities. Issues of lesser importance do not usually justify a global meeting.

▲ The expected outcomes require the skills of many prospective participants, and cannot be accomplished in other ways (for example through email or online discussions).

▲ The meeting is well structured. It is not simply an 'information sharing' session but rather is systematically organized to accomplish one or more of the following expected outcomes:

- Some form of **dynamic co-creation, rapid ideation, or other creative group work**. An example might be creating the outline of a strategy in a major new area of work.
- **Well-designed tacit knowledge sharing** (i.e. sharing of knowledge from experience, using one or more knowledge exchange methods such as those in this Toolbox) **or community building**, with a suitably skilled facilitator, for specialists in a shared thematic area of work. For strategic priorities, face-to-face knowledge exchange can justify the time and expense needed, because it leads to more targeted and in-depth sharing, and promotes adaptation of knowledge to new contexts.
- **Project kick-off for major new organizational initiatives** (those spanning multiple countries/regions or with significant global strategic implications). Ideally, project kick-off meetings are combined with ideation

and co-creation, knowledge sharing, and/or reflection on past experiences, to ensure the best possible results.

- **Systematic reflection on completed major organizational initiatives**, to review actions and results and to formulate recommendations for more effective future action.

For more detailed guidance on how to run effective meetings of all kinds, refer to 'Effective Meetings' in this Toolbox.

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