

MAKING MEETINGS WORK

FIVE KEYS TO LEADING MEETINGS

- Planning
- Starting
- Focusing
- Facilitating
- Concluding

Each one of these keys is critical to the success of the meeting.

- **Planning** is all of the things that must be done to prepare for the meeting. (Give me some examples: agenda, logistics...)
- **Starting** refers to how you set the tone and create the climate for the meeting. (Examples: food, seating arrangements, energy level...)
- **Focusing** means keeping the meeting on track. (Examples: time limits, ground rules...)
- **Facilitating** refers to the many things a leader can do to involve participants, be supporting, resolve conflict, and manage differences. (Examples: take charge, role assignments...)
- **Concluding** is the way in which the leader ends the meeting to assure that the participants feel satisfied with the outcome and that follow-up action will be carried out. (Examples: Summarize, assign...)

PLANNING A MEETING

Nine Steps to Planning A Meeting

1. Clarify the task of the meeting.
2. Define the desired outcome.
3. Design the sequence of meeting activities.
4. Determine who should attend, roles, and ground rules.
5. Decide when to meet, when to end.
6. Determine the logistics, equipment, and administrative matters, and notify participants.
7. Complete the agenda.
8. Communicate the agenda to participants.
9. Set up the meeting room.

“Which steps do you use and which ones do you neglect?”

- Thorough planning is critical to the success of the meeting.
- Failing to plan is planning to fail.
- It is important to go through all the steps.

“These may seem like common sense, or tedious steps.
But as you become accustomed to preparing for meetings in this way,
the steps will become automatic.”

Step 1: Clarify the task of the meeting

The task statement is a one-line statement describing the purpose of the meeting. The task statement starts with a verb. Some examples might be:

- To decide the best way to conduct re-election of officers.
- To hear a report on the conference.

“What are some other examples of verbs that can be used in stating the task (to solve, to view, to inform, to negotiate, to plan, to review, to listen...)”

Step 2: Define the desired outcome

The desired outcome describes the expected results of the meeting—the product that your members will take away with them when the meeting is over. It can be visible (a written plan) or not visible (new knowledge). It is written with nouns and phrases, not verbs.

For example: A solution, a decision, a cooperative attitude, commitment, motivation... “Are there other examples?”

We don't spend enough time thinking about tasks and desired outcome but it is critical to take that step in planning. The following steps are the items we are most familiar with.

Step 3. Design the Sequence of Meeting Activities

- Always plan an introduction and a summary to meetings.
- Use an icebreaker, at the beginning of the meeting to warm up the group or during the meeting to generate energy. (Samples of icebreakers are in your binders.)
- Sequence meeting topics using the following considerations:
 - ✓ High-priority before lower-priority topics.
 - ✓ Logical sequence—building information/discussions toward a conclusion.
 - ✓ Standardized sequences such as problem solving.
 - ✓ Alternating high-energy and low-energy topics.
 - ✓ Important topics when high energy is expected.
 - ✓ Encouraging participation and dialogue, by allowing other members to present first.
- Allow sufficient time for an ending.

Step 4. Determine Who Should Attend, Roles, and Ground Rules

WHO SHOULD ATTEND?

- Those with relevant information or expertise.
- Those who will make the final decision.
- People who are affected by or will carry out a decision.
- Anyone who might significantly prevent or interfere with the implementation of a decision.

ROLES

Group roles or functions are those leadership tasks that can be shared by several people at the meeting. The tasks can be designated ahead of time and announced at the meeting, or the leader can call for volunteers at the beginning of the meeting.

Some suggested roles are:

- Designated leader: responsible for managing the meeting.
- Timekeeper: keeps track of time and reminds group of planned start and top times for agenda items. Assists in maintaining meeting pace.
- Recorder: keeps a written record of the proceedings.
- Chart person: writes important points of discussion, lists of ideas, etc., on the chart. Assists by focusing group attention.
- Process observer: observes and makes comments about how the meeting is proceeding, often referring to the group's observance of ground rules. Raises group's awareness of how it is functioning in relation to accomplishing its objectives.
- Facilitator: may simultaneously fill the roles of timekeeper, chart person, and process observer; assists designated leader in accomplishing tasks and attending to group process.
- Navigator: keeps the group on track, noting if the discussion has strayed from the agenda.

GROUND RULES

Ground rules are guidelines for desired behavior that will enhance the process of the meeting and assist in accomplishing the task. They are standards that help clarify expectations regarding participation and can be used to control counterproductive behavior.

Examples of ground rules:

- Listen to the person who is talking.
 - One person talks at a time, without interruption.
 - Stay on track.
 - No side conversations will occur.
 - Be creative.
 - Communicate directly and honestly.
 - Hold questions until a person has finished speaking.
 - Limit contributions to five minutes.
- It is a good idea to ask the group to suggest additions to ground rules.

Step 5. Decide When to Meet, When to End

- Hold important decision-making/problem-solving meetings when people have high energy.
- Be conscious of academic or other major event conflicts.
- Decide what time the meeting is to begin and what time it is to end.
- Set meeting length according to agenda items, energy needed, time, and logistical constraints. Energy usually drops after two hours. Try not to exceed six hours, unless it is a retreat with scheduled breaks.
- Set the meeting date for a day when all essential people and information are available. Allow adequate time for attendees to make preparations.
- Schedule ten-minute breaks every two hours.

Step 6. Determine Logistics, Equipment, and Administrative Matters, and Notify Participants

- Meeting location: Choose a meeting room and facilities that best support your meeting task, desired outcomes, and activities. Favor a larger room for longer meetings, with movable chairs and tables, good ventilation, and lighting.
- Room layout: Plan your arrangements of tables and chairs.
- Equipment and supplies: Decide what audiovisual and other equipment you will need and supplies such as paper, pencils, name tents, name tags, markers, tape, overhead transparencies, etc.
- Refreshments: While it is customary to serve coffee and rolls for a morning meeting and soda and cookies for an afternoon lift, too much caffeine and sugar can cause a subsequent drop in energy. Support participant energy levels by serving water, fresh fruit, fruit juice, cheese, crackers, low-sugar snacks, and decaffeinated drinks. Food can also be very distracting if you have an extensive agenda. Minimize meetings with meals unless your primary objective is to socialize.
- Notification: Inform participants about the date of the meeting as early as possible so they can mark their calendars. Let them know to expect more details about the meeting later.

Step 7. Complete the Agenda

- Meet with your other officers and advisor beforehand to plan agenda items.
- Include an introduction at the beginning and a summary at the end, allowing five to fifteen minutes for each.
- Note especially, and write out, the desired results you want for each agenda topic, just as you would define desired outcomes for the meeting.
- You may elect to ask participants to add agenda items, if they wish. Be sure to assess the amount of time required for each item and note it when you record the agenda item.
- Write the agenda on a chart so all participants can see it during the meeting.
- Examples of agenda items:
 - ✓ Call to order, review agenda
 - ✓ Opening comments, welcome, introductions, icebreaker
 - ✓ Minutes
 - ✓ Officer/Committee Reports
 - ✓ Old, unfinished business
 - ✓ New business
 - ✓ Announcements, including date, time and place of next meeting
 - ✓ Closing remarks and reminders of specific tasks to be completed before the next meeting
 - ✓ Adjournment

Step 8. Communicate the Agenda to Participants Prior to the Meeting

- Determine the most effective means of notifying members/participants (fliers, ads, email, letter, etc.)
- Send the written agenda to participants as early as possible before the meeting.
- If feasible, call each participant (especially to key players) to make personal contact (or through a phone tree), confirm attendance, and share expectations with those for whom you have designated shared leadership roles.

Step 9. Set Up the Meeting Room

Arrange the meeting room to support accomplishing your desired outcomes and agenda activities. Vary the room layouts depending on the purpose of the meeting. Allow enough time to set up properly.

- Set up theater-style seating with podium for one-way information meetings.
- Seat people so they can see one another for information-exchange meetings, problem-solving, planning, or decision making.
- Disperse powerful or high-ranking people around the group.
- Disperse people have various roles around the group, particularly if the group is fairly large.

Consider equipment and comfort:

- Be sure that overhead or slide projectors do not block vision.
- Attend to ventilation, lighting, room temperature, and noise.
- Be sure all other needed equipment is in place.

Are there things you:

- Don't understand,
- Don't agree with,
- Find strange or new, or
- Wonder why

FOCUSING

- One of the major problems in leading a meeting is keeping the meeting focused on the task.
- There are many ways to assure the meeting adheres to the agenda and to deal with irrelevancies, tangents, interruptions, etc.

FACILITATION

A meeting leader must facilitate participant involvement, deal with conflict, manage differences, make sure that everyone is heard, keep communication open, and carry out many other tasks that will help participants feel as if they are making a worthwhile contribution to the meeting.

HOW TO CONCLUDE A MEETING

- Summarize what has been accomplished today.
- Compare the accomplishments with the desired outcomes.
- Identify unfinished business and suggest ways to address these issues.
- Complete the action plan: who will do what and when
- Ask for feedback, verbal and written, on the content and process (Refer back to Positive/Negative, Pluses/Deltas, Meeting Evaluation Form)
- Thank people their time and participation and state that meeting is adjourned.

AFTER THE MEETING

- Evaluate the meeting; did you fulfill your tasks and desired outcomes.
- Follow up with members during the week to make sure assigned tasks have been completed
- Enforce attendance requirements; follow up with those who are not showing up.
- See that the minutes are printed and distributed.