Managing Effective Meetings

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Why Are Meetings Important?

- To exchange information
- To make decisions
- To socialize – build trust, friendship, communication, group identity

What Goes Wrong at Meetings?

- Confused objectives and expectations: Why did you call the meeting and what is the group supposed to be doing.
- Multi-headed animal syndrome: Everyone going in different directions at the same time.
- Confusion between process and content
- Unresolved questions of power and authority: Do we have the power to make this decision?
- Unclear roles and responsibilities: Who is supposed to be doing what?
- Manipulation by group leader: Abuse of power in order to achieve personal objectives.
- Unwillingness to address “the problem"
- Lack of participation
- Win/lose approaches to decision-making
- Too much information, not enough time
- Repetition and wheel spinning: Going over the same ideas again and again
- Traffic problem: Difficulty leaping into the conversational flow and getting a chance to participate.
- Lack of openness, trust, respect, communication
Personal attack: Attacking individuals rather than their ideas.

General negativity and lack of challenge: There is nothing that we can do about it, so why try?

Communication problems: Not listening to or understanding what other are saying or making faulty assumptions.

Poor meeting environment: Can’t hear, can’t see, too stuffy, etc.

Personality conflicts: Lack of openness and trust.

When Does a Meeting Work?

Clear, agreed-upon objectives

The right people participate

Relevant information is available

You accomplish what you needed and wanted to (content)

The process was it a fair, effective, and efficient
Key Ingredients For Successful Meetings

- Make sure the right people are present
- Agree on the purpose and content
- Agree on the process
- Clearly define roles and responsibilities
- Provide relevant information
- Maintain an open and balanced conversation; designate a facilitator
- Prepare, prepare, prepare -- the key to success of any meeting, regardless of how it is run, is planning and preparation. Consider these basic questions:
  - Why have a meeting? What are your objectives and expectations?
  - What type of meeting do you want to have?
  - Whom do you want to attend the meeting?
  - What kind of involvement and participation do you want?
  - How many people do you want to attend the meeting?
  - Where are you going to meet?
  - How should the room be arranged?
  - What roles and responsibilities should individuals have during the meeting?
  - Who will have the power and authority to make decisions?
  - What methods are you going to use to facilitate discussion, problem-solving, and decision-making?
  - Will there be an agenda?
  - Will there be presentations?
  - Will there be some kind of record?
  - What are the desired outcomes of the meeting?
  - How are you going to determine tasks and follow through? Who is going to do what by when?
Common Roles in Effective Meetings

Manager/Chair
- Does not run the meeting
- Becomes an active participant
- Otherwise, he/she retains all of their powers and responsibilities.

Facilitator
- A neutral servant of the group
- Does not evaluate or contribute ideas (unless agreed to beforehand)
- Focuses energy of the group on a common task
- Suggests alternative methods and procedures
- Protects individuals and their ideas from attack
- Encourages everyone to participate
- Helps the group find mutual gain solutions
- Coordinates pre- and post-meeting logistics

Recorder
- Another neutral, non-evaluating servant of the group
- Write down the basic ideas on a large sheet of paper in front of the participants (the “group memory”)
- Does not edit or paraphrase, but uses the words of the participants
- The objective is not to record everything that is said (these are not minutes!) but to capture enough so that ideas can be preserved and recalled at any time

Group Member
- An active participant in the meeting
- Keep the facilitator and recorder in their neutral roles and make sure that ideas are recorded accurately
- The control of what happens in the meeting should rest in the hands of the group members
- They can make procedural suggestions, overrule the suggestions of the facilitator, and generally determine the course and outcomes of the meeting
**Resource People**

- People with relevant knowledge, information, authority, interest
- Help inform and invigorate the discussion among the participants
- They are not part of any problem-solving or decision-making per se
Meetings to Build Agreement

Managing meetings according to Robert’s Rules of Order, where all conversations and discussions proceed through the chair, is not an effective format to resolve multiparty public disputes or to build agreements. Meetings designed to address public conflicts are for the participants, and therefore should be designed by the participants.

The most important elements in managing meetings to build agreements and resolve public disputes are to:

- **Prepare in advance** — agreements are not built at meetings, they are shaped between meetings. This requires a significant commitment on the part of the participants and the meeting manager or facilitator. As a rule of thumb, you should spend 80 percent of your time building agreement between meetings, and 20 percent of your time ratifying and clarifying your conversations at meetings.

- **Use an agenda** to shape the substance and flow of the meeting.

- **Summarize the meeting** in a way that captures the direction and tone of the discussions, areas of agreement, commitments, and agenda items for the future. Meeting summaries serve as a “group memory,” making sure that all the participants have a common understanding of the substance and process of the conversation.

  “Minutes” as kept under “Robert’s Rules of Order” are seldom useful in meetings designed to build agreement. Most effective meeting managers insist on preparing or, at the very least, approving and distributing the meeting summary, regarding it as an important tool in their role of ensuring effective meetings.

- **Rely on a meeting manager.**
Prepare in Advance

1. Make sure the right people are available.
   □ Who needs to present information?
   □ Who needs to be educated?
   □ Who needs to be present to make a decision?
   □ Does someone have to be present at the meeting for the decision to be implemented?

2. What is the objective of the meeting? To:
   □ Exchange information
   □ Analyze a particular problem
   □ Identify needs and concerns of a group
   □ Generate solutions to a problem
   □ Make decisions
   □ Handle routine, day-to-day business
   □ Socialize (build trust, friendship, communication, group identity)

3. Clarify the goals of the meeting.
   □ Determine desired outcome
   □ What does success look like?

3. Prepare and distribute appropriate materials.

4. Read the relevant materials before the meeting.

5. Clarify roles and responsibilities.
   □ Who is responsible for developing and providing any materials necessary?
   □ Who is responsible for leading the discussion and presenting the materials and/or issues on each topic?
The Agenda

The agenda is one of the most important tools in effective meeting management. An agenda should specify at least the following matters:

1. The location of the meeting.
2. The time the meeting will begin and end.
3. A list of those expected to attend.
4. Clarify each topic to be addressed, including:
   - The purpose and goal of the topic discussion (exchange information, explore issue, reach a decision, etc.)
   - Determine the priority of each item (order according to sequence; difficulty/ease of reaching agreement; short/long discussion; complicated/easy items)
   - Estimate the time needed to address each item
   - Develop a tentative process to handle each agenda item
   - Identify the materials or presentations needed for each agenda item
   - Incorporate introductions and some type of focusing exercise at the beginning of the meeting
   - Make “review of agenda” the second item
5. Carefully consider the order in which the topics will be discussed:
   - address and dispose of administrative matters early
   - consider how each topic is related to other topics and whether some provide the basis for more informed discussion of others
   - consider whether some topics should be grouped to accommodate resource persons who are attending only to address specific issues
5. Schedule future meetings before participants begin to leave.
The Role of the Meeting Manager

- Coordinate pre- and post-meeting logistics
  - Provide adequate room and seating arrangement
  - Meet at a convenient location and time
  - Provide necessary materials
  - Provide refreshments, if appropriate
- Pursue a “no surprises” policy; talk with most, if not all, participants between each meeting
- Ensure that the meeting proceeds in an orderly manner so that it leads to useful results (follow the agenda)
- Encourage everyone to participate
- Foster a dialogue among the participants; don’t be the focus of the meeting
- Maintain an open and balanced conversation
- Encourage participants to communicate in a way that builds respect, clarity, and understanding
- Protect individuals and their ideas from attack
- Focus the energy of the group on a common task
- Suggest alternative methods and procedures
- Build bridges by reconciling differences of style and opinion
- Ask bridging questions -- ask participants how to satisfy their interests and the interests of the other people
- Help the group find “mutual gain” solutions
- Summarize and highlight areas of agreement and disagreement
- Maintain an appropriate sense of humor
- Create and maintain a “group memory”
☐ Review the “group memory” with all the participants before adjourning; this serves as a validity check to make sure everything was captured accurately

☐ Have participants evaluate the meeting

☐ Did you accomplish what you needed/wanted to? (content)
☐ Was it a fair, effective, and efficient process?
☐ What went well?
☐ What did not go well?
☐ What could be done to improve the meeting or future meetings?
Summarizing the Meeting

An effective meeting summary will:

- Record the persons in attendance.
- Track the agenda used for the meeting.
- Capture the sense of discussions and areas of agreement and disagreement, but without specifying who said what.
- Record and highlight all commitments.
- Clearly articulate any decisions that are made.
- Specify responsibilities for implementation.
- Outline agenda items for future meetings.

It is very important that the notes for the meeting be compiled and distributed as soon as possible after the session. This will ensure that translating the notes taken during the meeting in a summary for distribution is accomplished before normal memory loss sets in.

It is equally important that the meeting notes be distributed as soon as possible after the session. They not only serve as a reminder to individuals of commitments made but participants should be invited to provide any clarifications, corrections, or additions.

The meeting notes may be sent out in “draft” form. This makes it less difficult to make additions or changes. The “final” meeting notes can then be distributed, at the meeting. Note that meeting notes should not be “approved” in the manner that “minutes” are approved at the beginning of a meeting. However, any discussion regarding accuracy or clarification that is of particular importance and that is reflected in the “final” notes should be addressed.
Meeting Checklist

Things that make your meetings work!

Things to do for ____________________________ Meeting

Date ________________________________
Day __________________________________
Time __________________________________
Place __________________________________

Before the Meeting

☐ Clarify the purpose
☐ Contact the right people
☐ Mailing list and label
☐ Meeting space
☐ Who has key to building?
☐ Tables/chairs enough?
☐ Who puts “em-back?”
☐ Can you darken (slides/film?)
☐ Public address system? Find controls ahead of time.
☐ Parking/central location?
☐ Directional Signs (from parking to door)
☐ Materials
☐ Slide program/overheads
☐ Sign-up procedure
☐ Signs and displays
☐ Name tags
☐ Handout materials
☐ Refreshments/cups
☐ Contact the news media

At the Meeting

☐ Physical arrangements
☐ Don’t use the stage!
☐ Find the rest rooms
☐ Identify wall space for charts and visuals

After the Meeting

☐ Put everything back the way you found it
☐ Who will summarize and document the meeting? By when?
☐ Add names to mailing list
☐ Collect response cards/evaluations – who will summarize?
☐ What next? Take stock of what was accomplished and who needs to do what moving forward

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