



Effective Meetings

Objectives:

By the end of this lesson, participants will be able to:

- ✓ Describe what should be done to prepare for a meeting
- ✓ Discuss three strategies for getting a meeting off to a good start
- ✓ Discuss three strategies for creating an atmosphere of participation
- ✓ Discuss three strategies for moving a meeting forward to get results
- ✓ List three tips for ending the meeting on a positive note
- ✓ List three ways to follow up with committee members after a meeting

Advance Preparation:

- ✓ **Read Background Section - THIS IS IMPORTANT!!**
- ✓ Prepare index cards with characters in the "[Meeting of the Marching...](#)" role play
- ✓ Prepare the chart for [Meeting Jeopardy](#) on a flipchart or chalkboard (see example)

Materials Needed:

- ✓ Flip chart and easel with markers OR chalkboard and chalk
- ✓ 5 large index cards (5"x7") prepared with role play descriptions on them
- ✓ Prize for the Meeting Jeopardy winner or team (such as pens, candy, etc)
- ✓ One copy of the following handouts for each participant: A) [List of Meeting Characters](#), B) [Advisory Committee Meeting Planning Checklist](#), C) [Formal Advisory Committee Meeting Agenda](#), D) [Non-formal Advisory Committee Meeting Agenda](#), E) [Meeting Ground Rules for Success](#), F) [First Meeting Group Decisions](#), G) [How to End Meetings and Get Results](#), H) [Sample Follow-up Letter for Absent Committee Members](#)

- ✓ Costumes and Props (OPTIONAL)
 - Meeting Maker - tailor/seamstress attire, tape measure, scissors, pattern, agenda, calendar, day timer
 - Meeting Minder - businessman/woman attire, agenda, bylaws, Robert's Rules of Order, and committee member job descriptions
 - Meeting Mover - train conductor or pilot attire, agenda with a checklist, clip board with pencil hanging on string
 - Conflict Causer- wicked witch attire (get from the Halloween party or theme store), a crumbled agenda
 - Meeting Killer- grim reaper in all black with a torn agenda, skull head and dagger (get from Halloween party theme store)

Time Needed: 3 hours

BACKGROUND

Organized meetings are important for the success of advisory committees as well as any other group. Whether monthly or quarterly, meetings provide groups the opportunity to meet face-to-face to develop group identity and cohesion; define a shared vision and purpose; and develop special projects, tasks and activities. While most of the actual work performed by the group occurs between meetings, meetings serve as catalysts for measuring progress towards tasks, sharing ideas, group decision making, and group recognition. If properly planned, meetings can be effective. Effective meetings are efficient, results focused, and motivating.

Effective meetings efficiently use participant's time. The meeting chair takes steps to recruit influential leaders in the community with a large network of contacts and program area expertise. Because these individuals are very busy, each meeting should maximize their time. This unit presents strategies for more efficient meetings.

An effective meeting is result focused, because it evokes a sense of accomplishment among participants, is action oriented, and gets clear results. Individuals should leave the meeting with a sense that the group has achieved the objectives of the meeting. Everyone should be clear on the action that has been taken (progress of the group) and what is needed (action steps) after the meeting. Everyone must also be clear on who is responsible for various tasks. This orientation towards actions helps keep the group focused and fosters a sense of achievement in even the smallest of successes.

Effective meetings motivate people to take action and become involved

in the projects and activities that the committee undertakes. Effective meetings also motivate people to come back to the next meeting. The bitter truth is that volunteers will go to a meeting if they feel that it is worth their time. This unit will share tips for making meetings more motivating.

This lesson contains practical information on planning and conducting effective meetings. Topics covered include preparing for the meeting, getting the meeting off to a good start, creating an atmosphere for participation, moving the meeting forward to get results, ending the meeting, and following up after the meeting. Each topic highlights how to maximize meeting productivity and effectiveness.

Topic 1: Preparing for the meeting

Leading a meeting requires thorough planning. Decide the purpose of the meeting and put it in writing. It should be something you can measure or document. Don't write, "We will discuss solutions for production delays." Instead, be specific. "We will develop a plan to document causes of production delays."

Give all participants something to prepare for the meeting. This will make the meeting more significant to each group member. For problem-solving meetings, have the group read the background information necessary to get down to business in the meeting. Ask each group member to think of one possible solution to the problem to get everyone thinking about the meeting topic. For less formal meetings or brainstorming sessions, ask a trivia question related to the meeting topic and give the correct answer in the first few minutes of the meeting. These tips are sure-fire ways to warm up the group and direct participants' attention to the meeting objectives.

Ask committee members for a good meeting time. If the group is new, decisions about time, locations, and dates will be made at their first meeting (see First Group Meeting Decisions Handout). Arrange for a satisfactory meeting place a room that is large enough, has sufficient seating, and is conveniently located but isolated from excessive traffic, noise, and distractions.

Once you have determined the time and place, prepare a memo detailing the location and ending as well as starting times. Include the purpose of the meeting and, preferably, the agenda. Mention that people can call you to clarify agenda items prior to the meeting.

When participants have the agenda and access to background information before the meeting, it gives them sufficient time to prepare for any discussions or decisions that will occur during the meeting. This also saves time during the meeting. If attendees come to the meeting prepared, less time will be spent answering background information questions and more time for discussing the important issues. When

distributing the agenda, remind participants that it's their responsibility to come prepared to the meeting!

If special data or visuals are needed, list them in the memo and clarify what each person should bring or prepare. A few days later, follow up with a phone call or personal contact to verify that your memo was received and the recipient is able to prepare and attend.

Topic 2: Getting the meeting off to a good start

Meetings must start precisely on time so as not to punish those who are punctual. This also sets the stage for how serious the chair is about making the meeting effective. Open the meeting with introductions. Clarify who will take minutes, prepare the action plan and deliver it to members after the meeting, and be responsible for any other procedural details that need attention.

State the purpose and review the agenda. Assign approximate times to each agenda item if you have not already done so. Explain that if the group gets off schedule, members will need to decide whether to table discussions until future meetings, refer the problem to a sub-group for study, agree to disagree and move on, or set the agenda aside and deal with the delay immediately. The chair may need to make decisions if the group cannot agree.

Clarify the ground rules. There are several effective ways to create ground rules. If time is an issue it may be necessary for you to simply list the ground rules for the group. Be sure to inquire whether the ground rules are agreeable.

A second way to create ground rules is to list those rules you commonly use, then ask for additional ground rules from the members. When somebody proposes a ground rule, ask the other participants if they agree to it. If most do, add it to the list.

The best way to create ground rules is to allow the members to generate the entire list. Ask them to think about what they, as individuals, need to ensure a safe environment to discuss difficult and controversial issues.

Topic 3: Creating an atmosphere for participation

There are many critical decisions that should occur at the first committee meeting. These decisions help to clarify meeting logistics. Everyone should feel comfortable in contributing to the decision-making process. Let's look at some examples of key decisions that a committee should make during their first meeting.

The chair is responsible for ensuring participation, focusing discussion, summarizing decisions, resolving conflict, and managing meeting dynamics. These techniques take time to master. The decisions made by

the group must be documented. Participants also have a responsibility to promote cooperation and mutual respect. The leader is instrumental in setting the tone, but participants are responsible for maintaining it.

When creating an atmosphere of participation, the chair should encourage group discussion to get all points of view. Turn questions back to the group for their input. Ask people to comment on something just said. Compliment people on their ideas and thank them for their input. Ask open-ended questions.

The chair should engage everyone into the decision making process. He or she may need to ask the more quiet members for their thoughts, and tactfully interrupt the longwinded ones to move the discussion along. Encourage people who just want to agree with a previous speaker to say "Ditto" rather than taking the time to repeat her/his point.

Facilitation is the key to not spend too much time in non-productive discussions. If necessary, ask the group to agree to a time limit on a discussion that might take too long. You might want to agree to limit each speaker's time, or say that no one can speak a second time until everyone has spoken once. If the group is spinning its wheels and people are only repeating themselves, restate and summarize the issues and ask if there is at least the beginnings of consensus. If it just doesn't seem that the group can make a good decision right now, suggest tabling the matter until another time. You may want to ask someone to bring back more information, or form a committee to work on the issue.

Topic 4: Moving the meeting forward to get results

It's the chair's responsibility to keep the meeting on track. This means steering the meeting discussion in a way that fulfills the meeting objectives. If you have difficult personalities in the room or opposing views, this can be challenging! Try using sentences such as, *"That's a valid point, but doesn't directly apply to this discussion. Perhaps we should schedule a separate meeting to address it fully."* Or, *"It's obvious there are some opposing views surrounding this issue. Perhaps our time would be best spent working towards a compromise. Any suggestions?"* If a meeting becomes particularly heated, it's best to address what's possible in the meeting but consider hiring a professional facilitator for the next meeting - a neutral leader who's trained to deal with high-pressure, high-conflict meetings.

Topic 5: Ending the meeting

Every meeting should conclude with a summary of work completed, a clear action plan for outstanding tasks, and a decision about subsequent meetings. The summary should relate directly to the purpose: What was the goal? Was it achieved? What remains to be done?

The action plan should list specific tasks, the person(s) responsible, and

the completion date for each. Resolve any confusion and adjust the plan as needed. Get the next meeting on the schedule while everyone is present. Check with participants in a few days to make sure they can complete follow-up tasks. The time you spend in preparation and follow-up will pay off with meetings that begin and end well.

An evaluation of the meeting should follow the session, even if the meeting continues longer than expected. Post-meeting evaluations provide immediate feedback to the facilitator and indicate the effectiveness and efficiency of the meeting relevant to its objectives. Take a few moments at the end of the meeting to discuss what the group did well during the meeting and which areas need improving.

At the end of the meeting, the leader should review the action items, who's responsible and by when. This way, everyone has a clear picture of who's responsible for what when the meeting's over.

Once the meeting objective has been accomplished, adjourn the meeting. Even if it's thirty minutes earlier than expected! Don't continue meeting simply because that's what the schedule dictates. Let's look at more specific strategies for ending a meeting.

Topic 6: Follow-up after the meeting

Timely follow-up is critical for continued productivity. After the meeting is over, send the meeting information to all the participants. Make sure that the secretary or individual who took the minutes makes legible copies for the entire committee. Whether you provide the notes by e-mail or photocopied handouts, sharing this meeting information is vital for proper follow-up. Let's look at a sample letter to use when sending follow-up information for a meeting.

It's also a good idea to include a summary of all the action items assigned during the meeting. This acts as a reminder to all participants of who's responsible for what and by when. A written account of all assignments increases the obligation and urgency to complete the task.

INTEREST APPROACH

- Select six people to role play "Meeting of the Marching Magnificent Magnolias". Distribute the index cards with their character's description and ask them to pretend to be the character they've been assigned. Do not reveal who is assigned to which character.
- Once everyone involved in role play knows their part, distribute Attachment A "List of Meeting Characters" to everyone else in attendance. Ask the group to read the attachment to see what these characters are like, see if they can guess the characters during the role play and think about what could be done to plan and implement an effective meeting that takes into account each

type of character.

- Conduct the role play using the script.
- After the role play, encourage the group to reflect on what happened by using the following questions:
 - Think about what happened when a Conflict Causer or Meeting Killer was at work. Think about how the other committee members handled the situation. If you were in this similar situation, what else would you have done? What can be done to minimize the conflict that these characters create?
 - Think about how having a Meeting Maker, Meeting Minder, and Meeting Mover helped make this meeting more effective. Think about people you have on your committee or would like to have on your committee who could serve in those roles. How would you work with those different types of people to make the meeting more effective? What can you do to keep these types of characters involved in your meetings?
 - Are there other characters that you might know that attend meetings on a regular basis that "need to be recognized, acknowledged and dealt with" to move your meetings forward to get the best results? If so, think about how to work with those different types of people.

About the Characters: All of the characters are fictitious, but there are people who have some of these characteristics in almost every group. The object of this exercise is to have fun exploring these characters.

An alternative to this exercise would be to let each person read the script silently. Break up the audience into groups of 4-6 and ask them to discuss the reflection questions. One person from each of the small groups can then report back to the larger group strategies that they recommend to help deal with the different types of characters.

LESSON

- Start the lesson by asking and discussing the following questions:
 - Have you ever attended a meeting that seemed disorganized?
 - After a meeting ended, have you ever wondered what was accomplished?
 - Have you ever planned a meeting that did not seem to go over well with the attendees?
 - Are you now in charge of committee, but have little experience running meetings?
- Explain that the purpose of this lesson is to look at meetings in a general context and see how we might be able to effectively

plan and "move" our meetings forward to get the results that members desire.

- **Distribute the following handouts in the order presented and discuss each handout using the information you read in the Background section.** As you go through each handout ask the group to share their best or worst experiences with each topic. This fosters group interaction and acknowledges their personal experiences and expertise.
- Distribute a copy of the following handouts: Advisory Committee Meeting Planning Checklist (Attachment B), Formal Advisory Committee Meeting Agenda (Attachment C) and Non-formal Advisory Committee Meeting Agenda (Attachment D).
- Distribute a copy of the handout entitled Meeting Ground Rules for Success (Attachment E). Ask committee members to volunteer to share which ground rule they feel is the most important and why.
- Distribute and discuss the handout entitled First Meeting Group Decisions (Attachment F).
- Distribute a copy of the handout entitled How to End Meetings and Get Results. (Attachment G). Ask members to share their experiences with good or bad meeting endings.
- Distribute a copy of the handout entitled Sample Follow-Up Letter for Absent Members (Attachment H).

APPLICATION

- Play "Meeting Jeopardy" based on the six main topics of the lesson.
- Divide the group into 2-3 teams or let individuals answer questions aloud.
- Ask a volunteer to keep score. Offer a prize to the winning team or individual.
- Emphasize the rules:
 - Unlike the television version, there are no daily doubles and no final round.
 - All participants must answer in the form of a question in order to receive points.
- Play the Game using the diagram you prepared earlier and the questions found in the Meeting Jeopardy attachment. Once a dollar amount is selected, mark it out on the board.

REFERENCES

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