

Meeting Process Recommendations

Many employees and community members express dissatisfaction with meetings and complain that time spent in meetings is often nonproductive.

Common concerns about standard meetings are:

- Holding meetings that are unnecessary
- Lack of preparation (no agenda, meeting objectives not clear, etc.)
- Generally weak meeting management/facilitation (inefficient use of time, difficulty handling conflict, unpreparedness, lack of focus, etc.)
- Timeliness (not starting/ending on time, late arrivals, etc.)
- Lack of closure/follow up or agreement on action to be taken

Following are some simple, easy-to-follow guidelines that may be helpful each time your group meets.

1. Establish and follow a set of norms for all meetings.

Meeting norms set ground rules or expectations on how people treat each other at a meeting. The norms focus on respecting all participants and are a simple yet powerful statement about the way meetings can be run. You may wish to use these norms as a starting point for a group conversation about expectations of each other, adapt them to fit your situation, and post the norms in each of your meeting rooms as a consistent reminder of your fundamental meeting guidelines.

2. Provide tools and guides for participants to make meetings more productive.

We have created some helpful tools and guides that participants can use to run and participate in effective meetings. Following is a list of the helpful information contained in this document:

Agenda Template

All meetings should have a written or unwritten agenda. This template provides participants with a template they can use to create a successful meeting agenda. The completed agenda would be shared with all participants in advance of the meeting so they are clear on the purpose and expected outcomes. The latter half of the template allows participants to record key agreements and action steps.

Determining the Participant List

This one page document is intended to help meeting conveners determine whom to invite to a meeting, a critical step to a successful meeting.

Tips for Meeting Participants

This one page document outlines the key activities/tasks for participants to ensure they contribute to and get the most out of the meetings they attend.

Checklist for Meeting Convener/Facilitator

This one page checklist gives participants who are convening or leading a meeting a list of suggested steps to follow before, during and after the meeting.

Types/Modes of Meetings

This one page document identifies the different types or modes of meetings and is intended to help participants think through the purpose of a planned meeting and agenda items.

It should be noted that since all meetings are not the same, we would encourage participants to select those meeting practices which fit each specific meeting. For example, a brainstorming session with 15 people should be treated differently than a staff meeting or a one-on-one meeting. However, all meetings should follow the meeting norms (Recommendation #1) and have an agenda (written or not).

How to Have More Effective Meetings

3. Communicate the new process for meetings to all participants.

The meeting culture at your organization or in your community can only change if everyone knows about the new practices. In order to communicate that message efficiently, we recommend organization leaders meet with each group/unit/department to explain the basics and what is expected of them as meeting participants. Key materials should be distributed and an announcement should be made that training will be available (See Recommendation #4).

4. Offer training to interested people on how to convene, facilitate, record, write summaries, and effectively participate in meetings.

A training session would explain all of the tools and resources identified in Recommendation #2. It would also prepare participants for the most commonly experienced difficulties in convening, facilitating or participating in meetings.

5. Create a group of trained facilitators that can be called upon to facilitate meetings.

For certain meetings an objective facilitator can be a big advantage. Common Ground can provide customized training on facilitation for people who would be interested in being facilitators.

6. Evaluate the impact of the effort to improve meeting effectiveness.

In order to shape these meeting practices so they are most helpful to a community or organization, we recommend obtaining feedback from participants throughout the process. Evaluation of a meeting may be as simple as asking what worked well and what needed to be changed at the end of each meeting. If you are implementing a meeting process for an entire organization, we recommend a brief baseline survey to benchmark participants' perceptions of current meetings. You could also do a more formal survey approximately six months after implementation to determine how well participants are following the meeting practices and if meeting effectiveness has improved. Specific feedback about the training should be obtained from attendees, and periodic organization-wide or community-wide messages should be distributed with meeting tips and requests for feedback.

7. Encourage participants to help make meetings effective.

If participants attend meetings that do not follow the model in this recommendation, we encourage them to take steps to improve it. Specifically:

- Ask for an agenda prior to the meeting (or ask that one be created at the start of the meeting).
- If someone is not following the norms, raise the issue immediately and refer to the norms (posted on the wall).
- If a meeting does not go well, talk to the convener/facilitator afterwards to express your viewpoint. Use tact and be professional in expressing your concerns.
- If he/she continues to run ineffective meetings even after you have clearly expressed your concerns, discuss the issue with the meeting convener. The individual may need some coaching.
- Discuss with other attendees any regular meetings participants feel are not productive and discuss strategies for improving them. The focus of commentary should be on the process of the meeting and not the content.

Meeting Norms

Because many organizations and community members spend a lot of time in meetings, the following norms or ground rules are intended to make the meetings more pleasant, productive, efficient, and effective.

Meeting participants and leaders commit to:

- **Treat everyone with respect:** We will express our opinions responsibly, focusing on the issues and not on personal differences, and speak both honestly and kindly. The rest of the norms are related to this one.
- **Prepare adequately for the meeting and participate fully.** We will have read, reviewed or examined pertinent documents, gathered information or input, or simply assessed our own thoughts and ideas prior to the meeting.
- **Not interrupt each other.** We recognize that we all interrupt at times by mistake or to build on others' statements. However, we will strive to allow each person the space to finish his or her thoughts.
- **Express ourselves completely and concisely.** This norm recognizes the value of each other's input and time.
- **Engage each other's thoughts, ideas and opinions.** We recognize the value and richness of a meeting when everyone has a chance to participate. This norm also includes gracious acceptance of opinions different from our own.
- **Stay focused on the topic under discussion.** We will stay focused on the agreed-upon topics unless the group makes a conscious decision to alter the agenda.
- **Start and end meetings on time and arrive at meetings punctually.** We need to respect each other's time. The people who are present at the announced time should start without waiting for anyone not yet present.

Agenda Template

Name of Group:		
Date of Meeting:	Time of Meeting:	Type/Mode of Meeting:
Title of Meeting:		
Meeting Called By:		Location:
Participants:		
Meeting Objective(s):		

AGENDA ITEM	LEAD	PURPOSE/ACTION	TIMEFRAME

KEY AGREEMENTS

ACTION ITEMS

ITEM	PERSON TAKING ACTION	DUE DATE

Meeting Management: Determining the Participant List

Selecting the participants for a meeting is a critical and sometimes difficult function. No one who needs to be at a meeting should be left out, and no one should have to attend an unnecessary meeting.

The objectives of the meeting must dictate who needs to attend. When determining whom to invite to the meeting, think about who is best equipped to help the group accomplish the objectives.

Issues to Consider:

- Who are all of the **stakeholders** that may be affected by the outcome of the meeting? Start broad and narrow the list based on those that are most critical to accomplishing the specific meeting objectives. Remember not to shy away from inviting people with different opinions.
- What **type of meeting** is it? Different types of meetings suggest different participants.
 - **Decision-making:** All decision makers and representatives from each potential point of view from whom the decision-makers will need input (*Example:* Adoption of a new policy).
 - **Creative:** Individuals from a wide-range of experiences who have a lot of ideas and articulate them quickly and well (*Example:* Brainstorming new community park ideas).
 - **Informational:** Those who need to communicate the information directly and those that need to hear it firsthand (*Example:* New process for submitting requests).
 - **Motivational:** The leader(s) and the individuals that need to be motivated (*Example:* Announcing a business reorganization).
 - **Strategy Development:** Those with strong strategic thinking skills representing all appropriate areas of the community or organization (*Example:* Developing a new community vision document).
 - **Implementation Planning:** Those with strong process skills, detail-orientation, and an in-depth knowledge of appropriate functional areas (*Example:* How to implement a new fund-raising policy).
 - **Volunteer:** Open to all, with the most interested choosing to attend (*Example:* Social event or a committee to increase meeting efficiency).
- Is it necessary/appropriate to have a **representative from each group** that may be affected by the meeting outcome?
- What **types of people** would help achieve the objectives? Big picture visionaries, strategists, practical nuts-and-bolts people, junior/senior level individuals, process-oriented people, all of the above?
- Is there more than one person being considered who would **duplicate contributions** (same group, similar knowledge about the issue, etc.)? If so, consider selecting just one.
- Will the addition of certain people consciously or unconsciously **discourage others** from fully contributing?
- What are the **personalities of and relationships between the prospective participants**? Are there potential conflicts that need to be anticipated or addressed otherwise?
- Are there individuals who may be **upset that they were not invited** or others that would be affected by the outcome but their participation is not necessary? If so, you may want to touch base with them prior to the meeting, letting them know about the meeting objectives and that you will include them when you send out the meeting summary.

Tips for Meeting Attendees

The best-planned meeting, led by the most able facilitator, will be successful only if those attending are prepared to fulfill their role. While some meetings may require only that you show up and pay attention, others require careful preparation and participation. Here are some tips for meeting attendees:

- ✓ Respond in a timely manner to requests for agenda items.
- ✓ Be on time.
- ✓ Be well prepared:
 - ✓ Be familiar with the agenda and objectives.
 - ✓ If uncertain about the purpose or your role, ask beforehand.
 - ✓ Review minutes of previous meeting, if any.
 - ✓ Read or gather background information ahead of time.
 - ✓ Have action items assigned to you at prior meetings completed.
 - ✓ Bring a copy for yourself (and others if appropriate) of the agenda and other materials distributed in advance.
- ✓ Be concise and to the point.
- ✓ Participate in a constructive manner.
- ✓ Stay on topic.
- ✓ Volunteer your time, talent and expertise to get things done.
- ✓ Be realistic in your availability and ability to carry out action items.
- ✓ Bring your calendar for scheduling future meetings.

Checklist for Meeting Convener/Facilitator

Before initiating a meeting, think about your need or goal and how best to achieve it (e-mail, memo, conference call, individual calls, meeting, etc.). If the most appropriate method is a meeting, then consider the type of meeting and participants and use the following checklist as appropriate to ensure it is successful. Checklist items with an asterisk (*) apply to all meetings.

Before the Meeting

Planning

- Identify the meeting purpose and desired outcome (*By end of meeting, I want the group to...*)*
- Identify appropriate participants*
- Prepare and distribute agenda in advance; ask for input and revise as necessary*
 - For each agenda item, identify action to be taken (discuss, decide, for information) and assign appropriate leader and time limit
- Determine strategies to achieve purpose (brainstorming, small group discussions, voting, etc.)
- Identify a facilitator, recorder, minutes taker and timer as needed
- Reserve room, equipment and refreshments as needed

Set-up

- Arrange tables, chairs, visuals and refreshments
- Bring copies of agenda and supplemental materials (markers, paper, tape, etc.)
- Set up and test equipment

Facilitating the Meeting

At the Beginning of the Meeting

- Start on time*
- Discuss the purpose of the meeting and outcomes expected*
- Review the agenda, time frame and format for meeting*
- Have individuals introduce themselves; Consider an icebreaker activity
- Develop or review ground rules; revise if necessary
- Address facility logistics (restrooms, smoking, refreshments, parking, etc.) as needed

During the Meeting

- Keep the group on track and on time*
- Encourage participation and protect minority opinions*
- Demonstrate respectful behavior*
- Confirm group's decisions or agreements*
- Respectfully enforce ground rules*
- Provide breaks or activities when needed

At the End of the Meeting

- Clarify next steps*
 - Confirm action items, person responsible and due dates
 - Set next meeting
- Evaluate the meeting process (what worked well, what to do differently)
- Thank the group
- End on time*

Follow-Up

- Engage in appropriate follow up*
- Distribute minutes of meeting soon afterwards including action items and responsibilities
- Check in with those responsible for action items to keep process moving

Types/Modes of Meetings

In order to better utilize the various guidelines for meetings which are available, it is of value to define more clearly the major types of meetings. This will allow for a more meaningful matching of checklist items and other materials to actual needs.

Although there are a number of meeting classifications, the four basic types are:

- Informational
- Discussion
- Motivational
- Creative Brainstorming

It should be noted that meetings often have agenda items that encompass more than one of these classifications. The facilitator needs to keep in mind what type of item each is and how to facilitate each portion of the meeting.

Informational

In this type of meeting the primary purpose is to disseminate information to a generally passive audience. The convener has communicated the objective ahead of time and has made an effort to select one or more times which will allow for the maximum attendance of those who will be affected by the information. If there is more than one item of sufficient independence, an agenda may be distributed at the time of the meeting or ahead of time if feasible.

Discussion

In this type of meeting input is desired from the attendees regarding a problem or issue, and the input may be used in making a decision. Agendas for this type of meeting should be distributed in advance of the meeting. Effort should be made to insure active participation by all attendees.

Motivational

The primary purpose of this type of meeting is to motivate the attendees to reinforce change and attitudes or take a particular action. It may be a relatively immediate and simple action or a more long-term alteration in behavior and can include presentation of information and discussion of relevant issues. An example of this type of meeting could be a meeting called by a department chair to announce a change in strategy.

Creative/Brainstorming

The primary purpose of a creative/brainstorming meeting is to generate new ideas. Generally, participants generate a large volume of new ideas without any criticism or judgment of the ideas. Such a meeting can be followed up by a process in which ideas are evaluated against pre-selected criteria. An example of this type of meeting might be the generation of new product ideas or design options for a community playground.

Vocabulary for Meetings

The list below is intended to ensure that your community or organization uses the same terminology with regard to meetings.

Action Item – A specific task taken on by a person or persons.

Ad Hoc – As needed, not consistent or regular.

Agenda – A list of items/topics to be discussed at a meeting.

Brainstorm – To generate many ideas (usually in a group) quickly, without criticizing any of the ideas.

Consensus – A generally accepted opinion or decision among a group of people.

Convener – A person who gathers people for a meeting.

Facilitator – A person who manages a meeting to help the group to accomplish its objectives most efficiently.

Goal – An aim or purpose.

Ground rules – Agreed upon principles/rules for a meeting.

Icebreaker Activity – An activity that relaxes and familiarizes participants.

Minutes – The written record of what was said and decided at a meeting.

Norms – See “Ground rules.”

Objective – Something which you plan to do or achieve.

Regular Meeting – A recurring meeting with a regular schedule.

Respect – Kindness, consideration and appreciation shown to another person with the assumption of best intentions.

Systemic Solution – A solution that addresses root problems and utilizes the established organizational system to prevent future manifestations of the problems.

Table – To delay discussion of a specific subject/topic (Usually, the subject/topic is moved to the end of the agenda or delayed for a subsequent meeting).