

Managing Effective Meetings

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Introduction ¹

Managing meetings according to Robert's Rules of Order, where all conversations and discussions proceed through the chair, is not an effective format for building agreements. Meetings designed to build agreement are for the participants, and therefore should be designed by the participants.

The most important elements in managing effective meetings to build agreements 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.**

¹ For more information on managing effective meetings, see Michael Doyle and David Straus, *How to Make Meetings Work* (Jove Books, New York, 1976); Gerald Cormick, "Making Meetings Better," in *Advanced Environmental Conflict Resolution*, (The Banff Centre for Management, September, 1994.); and Christopher W. Moore, *Environmental Mediation* (CDR Associates, Boulder, Colorado, 1986).

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
- Create and maintain a "group memory"
- Have participants evaluate the meeting

Module on Managing Effective Meetings

- 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 lem-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
- Wall space for charts/visuals
- Tapeoff used seating
- Room arrangements
- Start on time, end on time
- Money for facility
- Miscellaneous supplies
- Flip charts and paper
- Magic markers (colored)
- Pens, pencils for sign-up
- Masking tape
- Extension cords
- Projectors/screens
- Recorder/tapes

After the Meeting

- Document meeting -- who will summarize?
- Add names to mailing list
- Collect response cards/evaluations - who will summarize?
- Put everything back the way you found it.
- What's been accomplished?
- What's next?
- Who will do it?

