

TOOLS FOR RESOURCES MANAGEMENT

PLANNING AND LEADING EFFECTIVE MEETINGS

Plan ahead

Set meeting objectives

Meetings need to be carefully planned to meet both your interests and the interests of the participants. Think through the objectives of the meeting in advance, and be clear about what the meeting is intended to achieve. Avoid vague objectives, such as, “to meet people” or “to educate people,” and instead use, “to develop a strategy and timeline to implement an issue campaign,” “to recruit volunteers or new members,” or “to decide upon organizational positions.”

Select participants based on objectives

Think about who needs to attend in order to achieve your intended results. Keep the meeting small if possible. Talk with key participants before the meeting. Give them a chance to think about what they would like the meeting to accomplish. What issues would they like to have discussed? Anticipate controversies and problems that the meeting might face and plan for them.

Select an appropriate time and location

Pick a meeting time and place that is convenient for your participants. When you meet with the public, try to meet near key people’s homes or jobs so they do not have travel far to attend. Schedule your meetings for a time that is before or after working hours, so people do not have to take time off from work to attend. Check the community calendar and try to avoid evenings already taken for town government and school board meetings. Provide childcare if you can. If your group will meet on a regular basis, hold the meeting at the same time and place each time so participants do not get confused.

Prepare an agenda ahead of time

The person who convenes a meeting is responsible for preparing an agenda and distributing it to the participants several days before the meeting date. The agenda or an accompanying letter or phone call should clearly identify what is to be discussed at the meeting, why it is being discussed, and what is to be achieved from the discussion.

In preparing an agenda, consider including time for introductions and a discussion of the purpose of meeting, the format for meeting, and meeting ground rules. Include time limits on discussion and identify opportunities for audience participation. The agenda should always include the meeting date and location and the starting and ending times for the meeting. Bring extra copies of the agenda to the meeting—most people will forget to bring the copy you sent them.

Always keep meetings as short as possible—never set an agenda for more than two hours!

Prepare materials

Prepare any information or materials needed for discussion and make enough copies for all the participants.

To assure good turnout, remind people 3 to 4 days ahead of time.

Preparation on the day of the meeting

Arrive at the meeting place early and make sure the room is comfortable for the attendees. Arrange the chairs so everyone can see the speakers and the visuals and so that discussions will be comfortable and inclusive. A semi-circle often works well.

Bring all the necessary props like maps, flip charts, markers, slide projectors, overhead projectors and set them up well ahead of the meeting. Remember to bring spare bulbs for the projectors—one is sure to blow out during a presentation.

Select a place for people to sign in and set up refreshments. Assign meeting roles including chair (or facilitator), note-taker, timekeeper, presenters, greeter.

Running a good meeting

Follow your agenda

Meetings should always start and end ON TIME. This shows respect for the people who are taking the time to attend your meeting. Participants may have baby-sitters at home, or may have other commitments for after the session. Beginning and ending on time makes the group predictable and facilitates trust.

In smaller meetings, take time for each participant to introduce himself or herself. In larger meetings, introduce yourself, the presenters, and the other supporting roles. Use icebreakers to acquaint or energize the group if appropriate and if needed.

Lead discussions

Keep discussions focused on the topic. Make sure confusing concepts are clarified and explained. Create and maintain an environment where everyone can participate in a cooperative manner.

Structure discussions in stages so that all the evidence comes before the interpretation of the evidence, and all the interpretation comes before a decision on the action. Keep the stages separate. Try not to let participants jump ahead or go back over old ground.

Summarize and record decisions and action points.

Facilitation

Meetings designed to move a group towards consensus should use a facilitator rather than a chairperson. A facilitator asks, suggests, reminds, keeps track of the agenda, and then sees if people are ready for a decision. A facilitator is there to see that all members feel they are having a say and are listened to and accepted. A facilitator stays neutral but tries to provide enough structure so that what is happening between people doesn't interfere with the topic on the agenda.

A good facilitator:

- Keeps the members on the topic.
- Understands the goals of the meeting and the agenda and keeps the group moving forward.
- Involves everyone in the meeting.
- Controls domineering people.
- Draws out shy people.
- Summarizes what people are saying. Relates one person's comments to other's ideas.
- Asks people to develop their ideas more.
- Lets people know when they are approaching the allotted time and asks them to finish what they were saying.

- States the problem in a constructive way to encourage people to work on it.
- Seeks commitments for future involvement.
- Brings closure to discussions.
- Summarizes the meeting.
- Closes the meeting on time.

The group facilitator needs to be prepared for participants who want to cause trouble during the meeting. The following suggestions provide some ideas on how to productively respond to some of these individuals.

Know-it-all: You may run into a participant who projects the attitude that he or she knows it all. Do not take it personally. You can acknowledge his or her idea, give it credit and then move on:

“I never looked at it like that before.”

“That is a good way to get it done. I had not thought of it that way.”

(Address another member of the group)

“What do you think?”

Questioner: Many time questions cause others to feel defensive. For example, “Why do you think that?” The facilitator’s job is to defuse the question and refocus the attention back to the questioner.

“That is a good question. Can we hold that until later?”

“I never thought to ask that. I’m wondering how you thought of that?”

“That is interesting. Maybe you can share why that information is important to you.”

Disagreer: There are individuals who disagree with just about anything you will say or do. **DO NOT TAKE IT PERSONALLY.** Keep the focus on results. Most disagreements center around whose process is better.

“That is one way to see it” Then turn to the group, “Does someone see it differently?”

“That is a good way to get results. However, I got my results by...”

Passive-Aggressor: Passive aggressive participants try to manipulate the leader and participants into giving them attention as a result of their inappropriate attitudes and actions. Leaders and participants should ignore negative behaviors. Do not allow yourself to be manipulated into disrupting the group purpose and activity to attend to inappropriate behavior.

Withdrawer: It is important to reach out to participants who have withdrawn from group participation or who show signs of pulling into themselves. The leader can encourage the person to contribute, or ask for their help. If the withdrawn person fails to interact, the leader must make contact at breaks, at the end of the meeting, or arrange a follow up meeting with the person after the meeting.

Ending the meeting

End the meeting on time. Save some time at the end to review and summarize the meeting. This assures that participants are in agreement on meeting results and assignments.

Send a meeting summary or minutes to all participants soon after the meeting.

Set behavior norms

Groups that meet on a regular basis should consider setting ground rules or guidelines to govern behavior at their meetings. The groups should discuss and agree on the norms and agree to work together to see that the norms are followed. If necessary, the agreed upon norms can be posted at each meeting.

Some of the following norms are often appropriate:

- Be punctual.
- No backtracking for people who are late.
- No beepers/cellular phones.
- Establish a 5-minute rule (after 5 minutes of discussion on one topic, participants can call the 5-minute rule and close out a discussion that is going no where).
- Rotate responsibilities such as meeting chair and secretary.
- One person speaks at a time.
- Criticize ideas, not people.
- Confine all discussion to the current topic.
- Include everyone in the discussion.
- Do not accept the first idea—go for the second and, even better, the third.
- Define acronyms.
- Speak up. Ask a question when you have one. Feel free to share an illustration.
- Avoid killer phrases like, "It will never work."
- Keep an open mind.
- Give feedback directly and openly.